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# FINANCIAL ADVISOR ASSISTANT RESUME

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## Objective:

To obtain the Financial Advisor Assistant position and utilize my experience and skills for the successful completion of each job task.

## Summary of Skills:

- Operational knowledge of financial services industry
- Ability to prepare correspondence, process incoming and outgoing mail
- Ability to maintain confidentiality with sensitive information
- Ability to handle multiple tasks and meet deadlines
- Strong telephone and customer relations skills
- Excellent business writing and grammar skills

## Work Experience:

Financial Advisor Assistant  
Best Wise Associates, McLean, VA  
August 2005 to till date

- Identified, cultivated prospective clients to build business.
- Determined financial and investment needs.
- Greeted visitors; answered, screened and directed phone calls.
- Collected data and updated weekly and monthly newsletters.
- Maintained an adequate inventory of supplies, forms and manuals.
- Supported the recruiting activities of the management team.

Financial Advisor Assistant  
CAPITAL FINANCIAL GROUP, McLean, VA  
May 2000 to July 2005

- Answered client questions and concerns.
- Ensured proper account documentation.
- Verified and monitored client financial condition on a continual basis.
- Conducted investment seminars for clients and prospects.
- Worked directly with the Retail Banking staff, supporting and motivating their investment services sales efforts.

## Education:

Associate Degree in Finance  
University of North Texas, Fort Worth, TX

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