

# FINANCIAL ADVISOR RESUME

As wealth management becomes an increasingly important issue in an uncertain economy, more and more people are turning to financial advisors as a way of staying in strong economic shape. A financial advisor might be employed in the private sector or might serve as a guiding individual for large organizations and corporations. Regardless, this position requires a bachelor's degree, with a master's degree being helpful. Strong math and communications skills are also desirable.

When you begin crafting your financial advisor resume, you should first identify where your strengths lie. Do you have a lot of financial experience that you can leverage? If not, what sort of education and skills can you present first and foremost? There are three different financial advisor resume format options provided below, with each of them serving as a way to show you how different levels of education and experience can give you an edge during the job application process.

## Entry-Level Resume

When you enter the financial advice field fresh from college, you may find yourself having a difficult time finding a job unless you know how to craft a good entry-level resume. This resume should focus on your professional skills and provide an in-depth look at what you learned in college. This will show that you have what it takes to excel in this field. Ms. Hayes, the individual in the financial advisor resume example below, has a strong educational background and ambitious attitude that should help her excel in this field.

### Monica Hayes

29 November Lane  
Aurora, CO 80010  
Mobile: 303-635-2187  
[email]

## OBJECTIVE:

Energetic and highly skilled financial advisor seeking a position which requires strong attention to detail, in-depth budget and accounting analysis, and communication with a diverse customer base.

## SUMMARY:

- Excellent ability to provide detailed analytical and financial research
- Terrific communication skills and ability to break down complex financial concepts into lay terms
- Superb relationship building skills
- Thorough knowledge of tax codes and financial strategies
- Highly motivated and very energetic

## EDUCATION:

**Bachelor of Science in Finance, May 2014**  
**State University of New York, New York, NY**  
Graduated with a GPA of 3.5 on a 4.0 scale

### Courses Included:

Economics  
Communications  
Investing Tactics  
Financial Accounting  
Business Management  
Retirement Planning

## Mid-Level Professional Resume

After three to five years of experience as a financial advisor, your body of work should be able to speak for itself. While you won't be able to rely entirely on your work history rather than your education and professional qualities, having a couple of items to add to your resume makes matters much easier. Kate Sowles, the individual in the financial advisor resume sample below, presents a straightforward analysis of her work history along with a few key traits that make her a very desirable candidate.

### KATE SOWLES

Phone: (303) 691-2324 | [email]  
88 Providence Street | Aurora, CO 80010

## Energetic and Engaging Financial Advisor

Extensive knowledge of long-term investments and retirement funds. Strong communication skills that allow for easy interaction with clients.

### SUMMARY:

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- Excellent analytical knowledge.
- Creative financial research methods.
- Comprehensive knowledge of economic trends.
- Able to provide private and corporate consulting services.
- Capability of working individually or with a team of people.
- Superb written and oral communication skills.

### EXPERIENCE:

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EDWARD GREY ASSOCIATES, Aurora, CO

**Financial Advisor**, 1/2012 to Present

Provide financial management and advice to individuals and corporate entities. Educate and assist clients in decisions regarding insurance, mutual funds, stocks, and bonds. Provide periodic updates on portfolio adjustments, market trends, and other important financial information. Key outcomes include:

- Provide portfolio management and planning for over 100 individual and corporate clients.
- Monitor investment accounts in detail, noting unusual transactions or activity.
- Reallocate funds to maximize profitability.
- Place trade orders.
- Maintain regular client relations through in-person meetings and electronic communications.

CHASE STREET ASSOCIATES, Denver, CO

**Participant Service Representative**, 7/2010 to 12/2011

Provided assistance with executing 401(k) plans and portfolio management. Relayed plan information to clients along with changes recommended by financial advisors. Provided in-depth customer service and ensured high level of customer satisfaction with each transaction. Key outcomes included:

- Oversaw 12 different company 401(k) plans.
- Provided account enrollment and management.
- Maintained high volume of clients in fast-paced environment while ensuring that each client received a high level of personalized attention and communication.

### EDUCATION

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University of Colorado, Boulder, CO

**Bachelor of Science in Finance**, 5/2010

#### Experienced Professional Resume

When you have accumulated between seven and ten years of experience, you move into the higher echelons of financial advice and become recognized as an experienced professional. At this point, your financial advisor resume should include a long work history and an overview of your professional qualities first and foremost. The financial advisor sample resume provided below should give you a good framework to begin from. Note that Ms. Manning begins with a personalized list of her skills before delving into a very impressive work history.

**Elaine Manning**

[email]

21 Tresser Hill Road | Aurora, CO 80010

Home: 303.272.5411 | Cell: 303.635.2097

#### **FINANCIAL ADVISOR | KNOWLEDGEABLE AND DETAIL-ORIENTED**

Highly organized financial advisor with nine years of experience and a proven track record for getting quality results for clients. Experience in finances and accounting at both individual and organizational levels. Demonstrated ability to handle multiple portfolios and get excellent results despite heavy workloads. Excellent customer reviews with a long history of customer satisfaction.

### Core Knowledge and Skills:

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- Financial analytics and research
- Building strong client-advisor relationships
- Team training
- Assessment and forecasting of economic trends
- Individual and organizational client consultation
- Accounting and bookkeeping

**Financial Advisor**, Manning Advising Group

2009-Present

Provide strategic quantitative models to help reduce fees and increase profitability for clients. Identify and develop customized development and investment strategies for individual and corporate investors. Develop specialized investment models for clients.

- Present strategic alternatives to current investment portfolios which will improve return on investment.
- Remain current on market forces and investment trends.
- Provide consistent and frequent verbal and written communication to clients.

**Financial Advisor**, Harrington Investments

2007-2009

Minimized risks and improved overall return on investment for high-income individuals. Built long-term relationships with individuals and small- and mid-level corporations. Provided quarterly analysis of portfolio performances and recommended changes based on current market trends.

- Helped increase the number of high-income clients by 25%.
- Presented strategic alternatives that helped improve overall portfolio performance.
- Communicated with clients and coordinated short- and long-term strategies for portfolio management.

**Accountant**, American Financial Advisors

2006-2007

Provided accounting and budgetary services. Projected long-term investment trends and made financial recommendations based on those projections. Maintained copious financial records and ensured that confidentiality was maintained at all times.

- Drafted quarterly reports on company performance.
- Led internal accounting meetings.
- Provided advice and feedback to investment professionals in order to maximize long-term profitability.

**Bachelor of Science**, Columbus University

Graduated with a BS in Accounting

Grade Point Average: 3.4 on a 4.0 scale

**Bachelor of Science**, Columbus University

Graduated with a BS in Accounting

Grade Point Average: 3.4 on a 4.0 scale

2002-2006

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