
Financial Representative Resume

Job Objective

To secure a position as Financial Representative with established firm in which I can continue to grow and excel in this field for the good of the company.

Highlights of Qualifications:

- Extensive experience working in financial services industry
 - Wide knowledge of bank policies and regulations
 - Ability to meet and exceed sales quotas on a regular basis
 - Ability to handle sensitive information and maintain confidentiality
 - Ability to help others manage and achieve financial security
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Professional Experience:

Financial Representative
Fidelity Investments, Boston MA
November 2006 – Present

- Suggested appropriate financial recommendations and ensured financial security for clients.
- Acted as an advocate for clients and nurtured long lasting client relationships.
- Expanded business practice.

Financial Representative
Mayo Clinic, Boston MA
February 2001 – October 2006

- Protected clients financially.
 - Aided clients to achieve financial and retirement goals.
 - Formulated strategies so that client's legacy lives on beyond their lifetime.
 - Nurtured relationships to generate fresh business.
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Education:

Bachelor's Degree In Finance
Virginia Commonwealth University, Richmond, VA

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