
INVESTMENT ADVISOR RESUME

Objective:

Seeking employment as an Investment Advisor in a qualified organization in order to bring my years of expertise in the industry to the table.

Highlights of Qualifications:

- Remarkable experience in the area of broking and investment advisory
- Profound knowledge of investment management and financial advisory services
- Skilled in developing new business using both traditional and alternative investment strategies
- Extensive knowledge of the various asset classes and investment management styles, asset allocation techniques, investment strategies and strategic tax planning strategies
- Excellent Communication and management skills
- Ability to work successfully in a small company environment

Professional Experience:

Investment Advisor, August 2005 – Present
PNC Bank, Rochelle Park, NJ

- Communicated with the clients to prepare an investment policy statement.
- Analyzed and executed portfolio changes as advised.
- Conducted periodic investment meetings with clients.
- Provided investment solutions and achieved supplementary resources from potential clients.
- Received referrals from satisfied clients and assisted the sales team in securing new relationship.

Investment Advisor, May 2000 – July 2005
Investment Advisors International, Rochelle Park, NJ

- Accompanied the Investment Advisors in maintaining and improving relationships with existing institutional clients.
- Supported the Regional Director and Investment Advisors in expanding existing account relationships.
- Collaborated with other sectors and outside vendors to complete assigned tasks.

Education:

High School Diploma, Owensmouth High School, Canoga Park, CA

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