
Investment Consultant Resume

Job Objective

Seeking an Investment Consultant position in an environment where I can utilize my experience and my knowledge to add value to an organization.

Areas of Excellence:

- Remarkable experience in managing and developing client relationships
 - Huge knowledge of financial services industry, investment solutions, risk management and asset allocation
 - Good understanding of the global institutional investment industry
 - Proficient with MS Office
 - Ability to be well versed with current trends
 - Ability to aid as effective mentor
 - Ability to make proactive, business development calls to prospects and clients
 - Superior communication skills
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Professional Experience:

Investment Consultant

Crystal, Visalia, CA, August 2005 – Present

- Evaluated and aided clients.
- Established relationships with clients.
- Managed sales leads generated through business partners.
- Carried out business development calls and formulated client investment reports.
- Imparted discretionary investment management services.

Investment Consultant

Nikolus, Inc., Visalia, CA, May 2000 – July 2005

- Coordinated with clients and relationship managers.
 - Aided as investment representative.
 - Managed special projects and duties.
 - Administered investment management staff.
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Education:

Bachelor's Degree in Business Administration

McNeese State University, Louisiana, LA

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