
Investment Representative Resume

Job Objective

Searching for the opportunity to work as an Investment Representative with growing company in which my abilities will be an asset to company.

Highlights of Qualifications:

- Remarkable experience in the financial industry
 - Profound knowledge of brokerage accounts, products and services
 - Wide knowledge of general finance concepts
 - Thorough knowledge of investment and insurance products
 - Ability to manage confidential information
 - Ability to build relationships and retain clients
 - Superior computer skills and the capability to type 30 WPM
 - Sound communication and sales skills
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Professional Experience:

Investment Representative

Zions Direct, Colton CA

November 2006 – Present

- Build fresh clientele base and marketed various financial products.
- Extended sound advices to investment personnel and portfolio managers.
- Aided in the advancement of short- and long-term trading strategies.
- Guided customers with investments.

Investment Representative

Johnson Financial Group, Colton CA

February 2001 – October 2006

- Administered client instructions.
 - Imparted information on market activity, company products and customer account data.
 - Offered apt solutions according to customer needs.
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Education:

Bachelor's Degree In Finance

Western Oregon University, Monmouth, OR

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