
Investment Specialist Resume

Job Objective

To work as an Investment Specialist for the right company seeking dependable employees. Looking to use my past skills and experience in the specialist field in order to help the company advance.

Highlights of Qualifications:

- Proficient with financial planning and investment planning software applications
 - Proven application of all aspects of a client's wealth management
 - Wide knowledge of investments, insurance, tax, education planning, retirement planning
 - Ability to coach and positively influence behavior
 - Good understanding of asset allocation and portfolio construction
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Professional Experience:

Investment Specialist
Infinity Consulting Solutions (ICS), Reno, NV
May 2006 – Present

- Carried out securities transactions.
- Aided self-directed customers.
- Assisted full-service customers.
- Imparted limited research and counseling services.

Investment Specialist
TD AMERITRADE, Inc., Reno, NV
March 2003 – April 2006

- Managed outbound phone sales activities.
 - Handled individual objectives and enforced new business development and sales programs.
 - Resolved problems with effective solutions.
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Education:

Bachelor's Degree in Business Management
New Jersey City University, Jersey City, NJ

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