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## Investment Strategist Resume

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### Job Objective

Seeking opportunity to work as Investment Strategist.

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### Highlights of Qualifications:

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- Wide experience in developing and implementing investment strategy
  - Profound knowledge of capital markets
  - Sound knowledge of retirement and pension programs
  - Familiarity with mutual and institutional funds
  - Proficient with Zephyr, Bloomberg, Ibbotson, Morningstar and database management tools
  - Wide knowledge of fixed income research, wealth management
  - Good understanding of fixed income markets and portfolios
  - Ability to work well with customers
  - Ability to oversee investment portfolio management
  - Ability to provide wealth management advises
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### Professional Experience:

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Investment Strategist  
Bank Of America, Oblong, IL  
August 2007 – Present

- Proposed asset allocation and investment ideas to clients.
- Worked with Financial Advisors to develop client presentations on economic outlook.
- Developed investment strategies to meet clients' financial objectives.
- Reviewed available investment options and proposed additional investment options for company.
- Performed rebalancing of composite funds on periodic basis.
- Defined investment policy statements for clients.
- Assisted in cross-selling financial services.
- Provided trainings to Investment Analysts as needed.

Investment Strategist  
Regions Financial Corporation, Oblong, IL  
May 2004 – July 2007

- Proposed asset allocation strategies for clients.
  - Provided non-traditional asset model recommendations to financial committee.
  - Worked effectively with Investment Solutions Group and Portfolio Management Group.
  - Provided advice to clients on investment management techniques.
  - Assisted in employee training, performance appraisals, promotions and termination activities.
  - Assigned work to team members and enforced organizational policies.
  - Participated in public speaking engagements.
  - Identified new business opportunities with clients.
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### Education:

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Bachelor's Degree in Finance  
Charleston Southern University, Charleston, SC

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