

---

## Personal Financial Advisor Resume

---

### Job Objective

Looking for employment as a Personal Financial Advisor to work for a great organization in order to act on my skills and past experience.

---

### Highlights of Qualifications:

---

- Certified Financial Planner with strong experience in investment management and financial advisory services
  - In-depth knowledge of Brokerage, Banking, Insurance, Wealth Management, mutual funds, stocks, CDs, IRAs, insurance, and annuities
  - Good understanding of basic personal financial planning and investment concepts
  - Proficient in MS Office Suite – Word, Excel and MS Access
  - Excellent time management, analytical and problem-solving skills
  - Superior communication, interpersonal and organizational skills
  - Great ability to develop and manage client relationships
  - Ability to multi task and work in team environment
- 

### Professional Experience:

---

Personal Financial Advisor, August 2005 – Present  
Retail Financial Services, Fort Myers, FL

- Determined changes in client's financial status.
- Enlightened clients about financial assistance available to college and university students.
- Advised clients about maintenance of all financial statements and records.
- Made recommendations, and referred clients for implementing financial plan.
- Determined clients financial status and other information needed to develop a financial plan.
- Researched trends and ensured effectiveness of plans.

Personal Financial Advisor, May 2000 – July 2005  
Kinecta Federal Credit Union, Fort Myers, FL

- Advised clients of their financial options in order to help them reach their short-term and long-term financial goals.
  - Reviewed client's financial information and goals and developed financial plan and investment recommendations.
  - Analyzed financial information and determined strategies to meet clients' financial objectives.
  - Handled clients' inquiries about the purposes and details of financial plans and strategies.
  - Determined plan reassessment need of the clients.
  - Sold financial products such as stocks, bonds, mutual funds.
- 

### Education:

---

Bachelor's Degree in Finance, Ventura College, Ventura, CA

[Build your Resume Now](#)