
TRAINEE FINANCIAL ADVISOR RESUME

Career Objective:

Looking for work within your organization as a Trainee Financial Advisor.

Summary of Qualifications:

- Strong accomplished experience of investment management and financial planning
- Good understanding of financial principles and practices
- Good knowledge of company's working structure, policies, mission, strategies, and compliance guidelines
- Ability to organize and manage multiple tasks and assignments
- Passion to grow current financial knowledge
- Proven ability to develop relationship and business partnering
- Ability to maintain effective working relationships with staff and others
- Excellent communication and interpersonal skills
- Strong leadership, management and motivational skills

Work Experience:

Trainee Financial Advisor, August 2005 – Present
Bank Of America, Covelo, CA

- Identified performance hurdles and developed book of business.
- Assessed customer needs, referred and provide solutions.
- Recommended investment products and services to clients.
- Overseen referral activities and followed up with customer.
- Planned and managed resources to run a productive practice.
- Established and maintained relationship with the management team and adhered to guidelines and policies.

Trainee Financial Advisor, May 2000 – July 2005
Raymond James, Covelo, CA

- Evaluated customers in terms of financial needs, current holdings, and available investment capital and helped them identify their investment objectives.
- Advised customers on investments and made suitable recommendations.
- Managed customer accounts and maintained records.
- Explained various securities market strategies and key factors.
- Obtained and verified customer's purchase and sale instructions, and followed up on completion of transactions.
- Oversaw customer's portfolio and made suitable recommendations.

Education:

Bachelor's Degree in Finance, Midland College, Midland, TX

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