
WEALTH MANAGEMENT ADVISOR RESUME

Career Objective:

To become a valued asset with the organization using my experience as a Wealth Management Advisor.

Summary of Qualifications:

- Exceptional experience in client wealth management activities
 - In-depth knowledge of bank loan, deposit, mortgage and credit products
 - Familiarity with wealth maintenance procedures and credit administration
 - Good understanding of wealth management – trust and financial planning
 - Proficient with client relationship management (CRM) systems and MS Office suite
 - Ability to identify and evaluate credit opportunities and risks
 - Ability to uphold a balance between advertising and credit risk parts
 - Strong interpersonal, sales and relationship management skills
 - Superior written, verbal and presentation skills
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Work Experience:

Wealth Management Advisor, August 2005 – Present
TIAA-CREF, Brooksville, FL

- Advised and trained new and existing employees.
- Managed and administered trust accounts.
- Prepared and presented trust lectures and seminars to internal and external groups.
- Sold, delivered and provided bank products and services to affluent clients.
- Identified client financial needs and conditions through financial planning analysis.
- Monitored investment accounts for adherence to investment and asset allocation objectives and policies.

Wealth Management Advisor, May 2000 – July 2005
New England Financial, Brooksville, FL

- Analyzed clients' financial needs and goals.
 - Provided guidance to clients about different insurance and investment products.
 - Implemented, and reviewed, financial strategies designed to help clients pursue their long-term goals.
 - Established and maintained excellent working relationships with various product and service specialists.
 - Developed, serviced and enhanced client portfolio ensuring integrated and seamless approach.
 - Established and maintained business relationships with centers of influence.
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Education:

Bachelor's Degree in Finance, Georgetown University, Washington, DC, DC

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