

WILLIAM JOHNSON

Financial Advisor

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Place of birth *San Antonio* Driving license *Full*

LINKS

[Linkedin](#), [Twitter](#)

PROFILE

Motivated and highly skilled Financial Advisor looking for a position that requires attention to detail, in-depth accounting analysis, and communication with a diverse clientele. Exceptional ability to provide detailed analytical and financial research. Strong communication skills and ability to break down complicated financial concepts into lay terms. Practical relationship building skills. In-depth knowledge of tax codes and financial strategies.

EMPLOYMENT HISTORY

❖ **Financial Advisor, Smiths Insurance** Jan 2018 — Dec 2020
Jacksonville

Conducted trades, managed internal systems, and wrote financial plans for 200+ clients with over \$250M under management.

- Meet clients in person to plan their financial goals.
- Explain the varieties of financial services you will provide.
- Inform clients and answer questions about investment choices and potential risks.
- Suggest investments to clients or alternatively choose investments on their behalf.
- Assist clients when planning for circumstances, such as education expenses or retirement.
- Watch over clients' accounts and determine if changes are required to improve account performance or accommodate changes, such as getting married or having children.

❖ **Financial Advisor, FNV** Jan 2016 — Dec 2017
Orlando

Maintained client returns 5% higher than the team average. Increased client approval scores from 87% to 98% by using time-saving tools to spend 7 hours more per week with clientele.

- Research investment prospects.
- Advising saving and budgeting.
- Planning and meeting short- and long-term goals.
- Explaining multiple account structures and investments that make sense for your situation.
- Identifying the appropriate asset allocation or investment mix.
- Helping reduce tax consequences.
- Speaking to clients to ascertain their expenses, insurance coverage, financial objectives, risk tolerance, tax status, and other information to develop a financial plan.
- Answering client questions about financial strategies and providing financial advice.

❖ **Financial Advisor, Liberty** Jan 2013 — Dec 2016
Indian Trail

Increased AUM by 27% in 20 months. Used UAFRS data from Valens Research to highlight undervalued investments. Increased individual investor performance by 40%.

- Analyzing financial information from clients to create strategies to meet client financial goals.
- Preparing and interpreting financial documents, income projections, and investment performance reports for clients.

- Implementing financial plans or referring professionals to clients so they can help them.
- Overseeing and updating client portfolios.
- Regularly contacting clients to identify any changes in their financial status.
- Building a strong client base and successfully maintaining it.

EDUCATION

❖ **University of Kansas** Jan 2018 — Dec 2020
Master of Science in Investment Management Kansas City

- Excelled in financial planning classes.
- Vice President, Student Valuation Club. Grew membership 70%

❖ **State University of New York,** Jan 2013 — Dec 2015
Bachelor of Science in Finance East New York

- Graduated with a GPA of 3.5 on a 4.0 scale.
- Courses Included: Economics, Communications, Investing Tactics, Financial Accounting, Business Management, Retirement Planning

SKILLS

Sales	Taxation
Financial plan analysis	Accountability
Investment principles	Dependability
Financial planning questionnaire	Honesty and Integrity

LANGUAGES

German *Native speaker* Dutch *Native speaker*
 English *Native speaker*

HOBBIES

Swimming, Diving, Surfing

COURSES

❖ **Certified Financial Planner** Dec 2020 — Dec 2020
CFP Board, Online