William Johnson

Financial Advisor

Los Angeles, United States   email@email.com

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 at 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 at 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.

Details

1515 Pacific Ave
Los Angeles, CA 90291
United States

3868683442

Place of birth

San Antonio

Driving license

Full

Links

Linkedin

Twitter

Skills

Sales

Financial plan analysis

Investment principles

Financial planning questionnaire

Taxation

Accountability

Dependability

Honesty and Integrity

Languages

German

English

Dutch

Hobbies

Swimming, Diving, Surfing

Jan 2013 — Dec 2016

Indian Trail

Financial Advisor at Liberty

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

Jan 2018 — Dec 2020

Kansas City

University of Kansas

Master of Science in Investment Management

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

Jan 2013 — Dec 2015

East New York

State University of New York,

Bachelor of Science in Finance

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

Courses

Dec 2020 — Dec 2020

Certified Financial Planner at CFP Board, Online