WILLIAM JOHNSON

FINANCIAL ADVISOR

DETAILS

ADDRESS
1515 Pacific Ave
Los Angeles, CA 90291
United States

PHONE
3868683442

EMAIL
email@email.com

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

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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 — Jacksonville

Jan 2018 — Dec 2020

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 — Orlando

Jan 2016 — Dec 2017

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.

English

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Dutch

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HOBBIES

Swimming, Diving, Surfing

Financial Advisor, Liberty

Indian Trail

Jan 2013 — Dec 2016

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

Master of Science in Investment Management, University of Kansas

Kansas City

Jan 2018 — Dec 2020

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

Bachelor of Science in Finance, State University of New York,

East New York

Jan 2013 — Dec 2015

- 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

Certified Financial Planner, CFP Board, Online

Dec 2020 — Dec 2020