



# RICHARD WILLIAMS

## Senior Financial Advisor

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Financial Advisor with 7+ years of experience delivering financial/investment advisory services to high value clients. Proven success in managing multi-million dollar portfolios, driving profitability, and increasing ROI through skillful strategic planning, consulting, and financial advisory services.

## Professional Experience

Senior Financial Advisor

**WELLS FARGO ADVISORS, Houston, TX**

January 20XX - Present

- Deliver financial advice to clients, proposing strategies to achieve short- and long-term objectives for investments, insurance, business and estate planning with minimal risk
- Develop, review, and optimize investment portfolios for 300+ high value clients with over \$190M AUM (Assets Under Management)
- Ensure maximum client satisfaction by providing exceptional and personalized service, enhancing client satisfaction ratings from 88% to 99.9% in less than 6 months

Financial Advisor

**SUNTRUST INVESTMENT SERVICES, INC., New Orleans, LA**

January 20XX - January 20XX

- Served as knowledgeable financial advisor to clients, managing an over \$20.75M investment portfolio of 90+ individual and corporate clients
- Devised and applied a new training and accountability program that increased productivity from #10 to #3 in the region in less than 2 year period
- Partnered with cross-functional teams in consulting with clients to provide asset management risk strategy and mitigation, which increased AUM by 50%

Financial Advisor

**MAVERICK CAPITAL MANAGEMENT, New Orleans, LA**

January 20XX - January 20XX

- Served as the the primary point of contact for over 15 clients
- Managed the portfolios of several major clients with over \$8.5M in total assets

## Education

Bachelor of Science in Business Administration (concentration: finance) **Honors: cum laude (GPA: 3.7/4.0)**

**RESUME GENIUS UNIVERSITY Baton Rouge, LA**

May 20XX

## Skills

- Proficient in MS Office

## Additional Skills

- Additional Skill 1