|  |  |
| --- | --- |
| **Richard Williams** | |
|  | |
| *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** | |
|  | |
| *August 2020–Present*  **WELLS FARGO ADVISORS, Houston, TX**  Senior Financial Advisor | |
| * 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 * Work closely with specialists from multiple branches, managing investment portfolios for over 800 clients with over $25M in assets under care | |
|  | |
| *July 2017–August 2020*  **SUNTRUST INVESTMENT SERVICES, INC., New Orleans, LA**  Financial Advisor | |
| * 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% | |
|  | |
| *July 2014–August 2017*  **MAVERICK CAPITAL MANAGEMENT, New Orleans, LA**  Financial Advisor | |
| * Served as the primary point of contact for over 15 clients * Managed the portfolios of several major clients with over $8.5M in total assets | |
|  | |
| **EDUCATION** | **ADDITIONAL SKILLS** |
|  |  |
| *May 2014*  **LOUISIANA STATE UNIVERSITY, Baton Rouge, LA**  Bachelor of Science in Business Administration (concentration: finance),  Honors: cum laude (GPA: 3.7/4.0) | * Proficient in MS Office (Word, Excel, PowerPoint) Outlook, MS Project, Salesforce, TFS Project Management, Webex * Fluent in English, Spanish, and French |
|  | |
| 3665 Margaret Street, Houston, TX 47587 • RichardWilliams@gmail.com • (770) 625-9669 | |
|  | |

****

**Dear Job Seeker,**

|  |  |
| --- | --- |
| Ready to land your next job offer?  In addition to this Word template, we provide a whole host of expert resume and cover letter writing resources and tools that'll help you boost your job search and increase your chances of securing work. | |
| [Resume Builder](https://resumegenius.me/4dTDx1F) →  [How to Write a Resume](https://resumegenius.me/4e1kjrc) → | [Cover Letter Generator](https://resumegenius.me/3yxEdtx) →  [How to Write a Cover Letter](https://resumegenius.me/4dT9p6A) → |

|  |  |
| --- | --- |
| Are you in a rush?  Speed up the application process by using a pre-formatted template: | |
| [Resume Templates](https://resumegenius.me/3yveoKG) →  [Cover Letter Templates](https://resumegenius.me/4dNfL7F) → | [CV Templates](https://resumegenius.me/4dNArwh) → |

|  |
| --- |
| Lastly, explore our job-specific resume and cover letter examples to ensure your finished application gives you the best chance of getting more interviews. |
| [Resume Samples by Industry & Experience Level](https://resumegenius.me/3yvj3fC) →  [Cover Letter Examples by Industry & Experience Level](https://resumegenius.me/4dT8QJW) → |

Good luck on the job hunt.

Shape

Description automatically generated with medium confidenceBest regards,

|  |  |
| --- | --- |
| **Fonts**  This template uses free fonts that are compatible with PC and Mac. You MUST download and install these fonts on your computer, before opening the file, in order for it to work properly. | |
| [Lexend](https://resumegenius.me/4dTDx1F) ↗︎ | [Inter](https://resumegenius.me/3yxEdtx) ↗︎ |
| Font Installation  After downloading the fonts, simply open the zip folders and install each font file on your system. | |
| **A black and orange square with black lines  AI-generated content may be incorrect.** Windows Users  Right click the font file, select "Install". We recommend fully restarting your computer after the font installation. | **An apple logo with a bite taken out of it  AI-generated content may be incorrect.** Mac Users  Double click the font files, click "Install", and then restart MS Word. |