

# Richard Williams

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## Summary

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

*August 20XX–Present*

WELLS FARGO ADVISORS, Houston, TX

- 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

### Financial Advisor

*July 20XX–August 20XX*

SUNTRUST INVESTMENT SERVICES, INC., New Orleans, LA

- 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

*July 20XX–August 20XX*

MAVERICK CAPITAL MANAGEMENT, New Orleans, LA

- 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

**Bachelor of Science in Business Administration (concentration: finance),**

*May 20XX*

**Honors: cum laude (GPA: 3.7/4.0)**

LOUISIANA STATE UNIVERSITY, Baton Rouge, LA

## Additional Skills

- Proficient in MS Office (Word, Excel, PowerPoint) Outlook, Salesforce, TFS Project Management
- Fluent in English, Spanish, and French

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**WJ Hussar**



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## Whispering the Secrets of Language: An Psychological Journey through **Resume Template In The Us Open Now**

In a digitally-driven earth wherever screens reign supreme and immediate conversation drowns out the subtleties of language, the profound techniques and mental subtleties hidden within phrases often go unheard. Yet, situated within the pages of **Resume Template In The Us Open Now** a fascinating literary treasure pulsating with fresh emotions, lies an extraordinary quest waiting to be undertaken. Penned by a talented wordsmith, this marvelous opus encourages viewers on an introspective trip, gently unraveling the veiled truths and profound affect resonating within the very fabric of each word. Within the mental depths with this emotional evaluation, we shall embark upon a genuine exploration of the book is core styles, dissect its captivating writing fashion, and fail to the powerful resonance it evokes strong within the recesses of readers hearts.

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