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| Richard Williams |
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| 3665 Margaret Street, Houston, TX 47587 • RichardWilliams@gmail.com • (770) 625-9669 |
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| Summary |
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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. |
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| Professional Experience |
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| Senior Financial Advisor WELLS FARGO ADVISORS, Houston, TX | August 2020–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
* Work closely with specialists from multiple branches, managing investment portfolios for over 800 clients with over $25M in assets under care
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| Financial Advisor SUNTRUST INVESTMENT SERVICES, INC., New Orleans, LA | July 2017–August 2020 |
| * 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%
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| Financial Advisor MAVERICK CAPITAL MANAGEMENT, New Orleans, LA | July 2014–August 2017 |
| * 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
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| Education |
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| LOUISIANA STATE UNIVERSITY, Baton Rouge, LABachelor of Science in Business Administration (concentration: finance), Honors: cum laude (GPA: 3.7/4.0) | May 2014 |
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| Additional Skills |
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| * Proficient in MS Office (Word, Excel, PowerPoint) Outlook, MS Project, Salesforce, TFS Project
* Fluent in English, Spanish, and French
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