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|  | **RICHARD WILLIAMS** | | 3665 Margaret Street, Houston, TX 47587 RichardWilliams@gmail.com | (770) 625-9669 |
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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. | |
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| **PROFESSIONAL EXPERIENCE** | | **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 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** | | **Bachelor of Science in Business Administration (concentration: finance), May 2014**  **Honors: cum laude (GPA: 3.7/4.0)**  *Louisiana State University, Baton Rouge, LA* | |
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| **ADDITIONAL**  **SKILLS** | | * Proficient in MS Office (Word, Excel, PowerPoint) Outlook, MS Project, Salesforce, TFS Project Management, Webex, and GoToMeeting * Fluent in English, Spanish, and French | |