

SENIOR MANAGEMENT

NAME

Address: City, State, Zip

Phone, Email

SUMMARY OF QUALIFICATIONS

Solutions- focused Investment Specialist with 2+ year's leadership in managing multi-million dollar asset accounts while administering trades for stocks, bonds and mutual funds. Strategic financial professional with proven success in improving transaction accuracy and efficiency by developing new review processes and generating account reports.

EDUCATION

The University of Ballarat

MBA Business (Major)

Sydney

EXPERIENCE

Infrastructure Investment

Sales Manager

- Ranked 1st out of 10 Investment Specialist for Infrastructure Investment, managing trades for stocks, bonds, mutual funds and ETF's.
- Managed 350 accounts with nearly Rs 450 million in assets.
- Contribute to training program for new sales assistants to aid in professional development, revolving issues with customers and discussing each project to reduce problems.

Financial Resources

Intern, Assistant to Financial Advisor

- Created financial profiles for new clients; developed mailers for potential clients to generate business.
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OPERATIONAL ACHIEVEMENTS

- Developed account review sheet that is still utilized by company.
- Decreased trade errors for approximately 10,000 annual trades by restructuring trading processes with new Trade Order Management System and implementing cross check on trades prior to transactions.
- Enhanced reporting accuracy by adjusting incorrect transaction codes while developing 2 year performance history for client accounts.
- Initiated seamless transfer to new portfolio management system and provided in-depth knowledge on best ways to utilize system while distributing written procedures to employees.