

Example 1

JANE E. DOE

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QUALIFICATIONS PROFILE

Performance-driven, insightful Investment Banker with a proven ability to achieve and exceed all business-development and revenue-generation goals in high-pressure environments.

- Skilled at consulting with clients to delineate and analyze their financial situations and develop strategic solutions to further their financial-planning goals.
- Relationship-development expertise that complements the ability to aggressively build solid client base and drive revenue growth.
- Comprehensive knowledge of and experience in leveraging numerous investment instruments in a variety of complex scenarios.

PROFESSIONAL EXPERIENCE

XYZ BANK, New York, NY

2005 to Present

Investment Officer (2010 to Present)

Manage relationship-banking team, ensuring production of revenue levels and territory profitability. Lead team in investment product sales and delivery of customer relationship management techniques. Collaborate with clients to assess individual financial situations and develop strategic financial planning solutions. Oversee securities transactions, funds transfers, margin accounts and option trades.

- Consistently maintained 100% or better of established production goals; achieved 127% of 2001 business development goal set at \$10 million in assets.
- Recognized for outstanding professional acumen with national awards for annual production of XYZ Capitol and ABC mutual funds in 2001 and 2002.

Investment Consultant, Private Banking (2008 to 2010)

Served as key team member in the brokerage services of fiduciary, investment management, and private banking services to new and existing high net-worth clientele. Established and maintained strong relationships with fixed income investment clients to continually drive revenue growth.

- Surpassed customer retention and business development goals by building client base to more than 600 investors.
- Received Alliance Capitol Advisory Award for ranking among the top 200 advisors worldwide in new business development.

Financial Consultant (2005 to 2008)

Developed client base through network and seminar marketing. Ensured client retention by providing strategic investment recommendations based on evaluation of analyst reports covering fixed income and equity investing.

- Consistently exceeded established account development and revenue generation goals.

ABC INSURANCE COMPANIES, New York, NY

2002 to 2005

Registered Representative

Collaborated with legal and accounting counsel to develop marketing strategies for estate and business succession planning insurance. Created proposals exhibiting extensive detail in internal revenue code and estate tax law. Developed solid estate and tax code knowledge base.

- Executed strategic sales techniques resulting in a solid account base and consistent performance above quotas.

EDUCATION

Inter Disciplinary Center (IDC) Herzliya Israel

Master of Financial Economy (2016)

Inter Disciplinary Center (IDC) Herzliya Israel
Arison School of Business
Bachelor of Business Administration (2010)

PROFESSIONAL LICENSES

NASD Series 7, 6, 63 & 65