|  |
| --- |
| RICHARD WILLIAMS |
|  |
| 3665 Margaret Street, Houston, TX 47587 • RichardWilliams@gmail.com • (770) 625-9669 |
|  |
| 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 skilful strategic planning, consulting, and financial advisory services. |
|  |
| PROFESSIONAL EXPERIENCE |
|  |
| WELLS FARGO ADVISORS, Houston, TXSenior Financial Advisor | *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
 |
|  |
| SUNTRUST INVESTMENT SERVICES, INC., New Orleans, LAFinancial Advisor | *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%
* Drummed up new business by cultivating solid relationships with clients, increasing the number of high-worth clients by 30%
 |
|  |
| MAVERICK CAPITAL MANAGEMENT, New Orleans, LAFinancial Advisor | *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
 |
|  |
| EDUCATION |
|  |
| LOUISIANA STATE UNIVERSITY, Baton Rouge, LABachelor of Science in Business Administration (concentration: finance), Honors: cum laude (GPA: 3.7/4.0) | *May 2014* |
|  |
| ADDITIONAL SKILLS |
|  |
| * Proficient in MS Office (Word, Excel, PowerPoint) Outlook, Salesforce, TFS Project Management
* Fluent in English, Spanish, and French
 |
| **Logo  Description automatically generated****Dear Job Seeker,**Formal and timeless, our “Classic” resume template has everything you need to impress even the most discerning hiring manager. Between its serif font and simple [resume format](https://resumegenius.com/blog/resume-help/resume-formats), the “Classic” is the template of choice for candidates in formal and traditional industries. We recommend using the “Classic” resume template if you’re in [law school](https://resumegenius.com/resume-samples/law-school-resume), or work in [finance](https://resumegenius.com/resume-samples/finance-resume) or medicine.If you’re still struggling to write your resume, here are some free resources to help you put together a resume that shows employers you’re the right person for the job:·     [Free Resume Builder](https://resumegenius.com/?utm_source=Word_Doc&utm_medium=Resume_Builder_Link&utm_campaign=RG_Downloads)·     How to Write a Resume·     [Resume Samples by Industry](https://resumegenius.com/resume-samples?utm_source=Word_Doc&utm_medium=Resume_Samples_Link&utm_campaign=RG_Downloads)Once you have a great resume, pair it with a convincing cover letter using our matching [2022 cover letter template](https://resumegenius.com/cover-letter-templates/modern-templates#2021). Here are a few resources to help you write a cover letter that gives your application the boost it needs to land you an interview:·     [Cover Letter Builder](https://resumegenius.com/cover-letter-builder?utm_source=Word_Doc&utm_medium=Cover_Letter_Builder_Link&utm_campaign=RG_Downloads)·     [How to Write a Cover Letter](https://resumegenius.com/cover-letters-the-how-to-guide?utm_source=Word_Doc&utm_medium=Cover_Letter_Guide_Link&utm_campaign=RG_Downloads)·     [Cover Letter Examples by Industry](https://resumegenius.com/cover-letter-examples?utm_source=Word_Doc&utm_medium=Cover_Letter_Examples_Link&utm_campaign=RG_Downloads)Best regards, Shape  Description automatically generated with medium confidence**IMPORTANT:** To delete the second page, right-click on the page and click “Delete Rows” |