

RICHARD WILLIAMS

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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 skilful strategic planning, consulting, and financial advisory services.

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

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%

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

Education

LOUISIANA STATE UNIVERSITY, Baton Rouge, LA

May 2014

Bachelor of Science in Business Administration (concentration: finance), Honors: cum laude (GPA: 3.7/4.0)

Additional Skills

- Proficient in MS Office (Word, Excel, PowerPoint) Outlook, Salesforce, TFS Project Management
- Fluent in English, Spanish, and French

Dear Job Seeker,

If you're looking for a classy resume template, you can't do any better than the "Milano". Its simple elegance is just what you need if you want to imbue your resume with a balance of professionalism and good taste — plus a dash of creativity.

Everything on the Milano is left-aligned, which helps the hiring manager quickly look through your resume by simply scanning down the page to identify relevant experience and skills.

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](#)
- [How to Write a Resume](#)
- [Resume Samples by Industry](#)

Once you have a great resume, pair it with a convincing cover letter using our matching [2021 cover letter template](#). 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](#)
- [How to Write a Cover Letter](#)
- [Cover Letter Examples by Industry](#)

Best regards,

The Resume Genius Team