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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
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| **Logo  Description automatically generated****Dear Job Seeker,**Our “White House” resume emphasizes simplicity and class. Its two-column format neatly left-aligns your headers and creates more space to highlight your career history. The “White House” template works well for anyone who is applying for more conservative roles, like [real estate](https://resumegenius.com/resume-samples/real-estate-resume-example), banking, and finance. 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” |