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# MERRILL LYNCH FINANCIAL RESUME

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## Career Objective:

Accomplished Merrill Lynch Financial Advisor with extensive experience seeking position with well established business firm.

## Summary of Qualifications:

- Strong experience in financial product sales
- Wide knowledge of accounting, law, consulting, and commercial real estate
- Good understanding of financial planning and the investment process
- Familiarity with mapping clients' investment needs to asset allocation models
- Excellent communication and interpersonal skills
- Outstanding sales skills
- Amazing ability to provide the best advice and service for their clients
- Outstanding ability to be self-motivated and proactive

## Work Experience:

Financial Advisor, August 2005 – Present  
Bank Of America, El Paso, TX

- Identified and developed prospective clients through seminars, referrals, and networking with existing clients.
- Implemented financial planning process.
- Implemented investment strategies and assisted with sales presentations.
- Implemented investment recommendations through active prospecting.
- Provided marketing and organization support to FA or FA team.

Financial Advisor, May 2000 – July 2005  
Merrill Lynch, El Paso, TX

- Advised clients regarding financial options to achieve set targets.
- Reviewed client's financial information and goals and developed financial plan and investment recommendations.
- Analyzed financial information and determined strategies to meet clients' financial objectives.
- Handled clients' inquiries about the purposes and details of financial plans and strategies.
- Determined plan reassessment need of the clients.
- Sold financial products such as stocks, bonds, mutual funds.

## Education:

Bachelor's Degree in Finance, DePauw University, Greencastle, IN

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