
Wealth Manager Resume

Job Objective

Seeking a chance to work with a growing company through filling the Wealth Manager position and putting my experience to good use.

Highlights of Qualifications:

- Experience in providing support to various banking environment and managing financial planning
 - Deep knowledge of departmental policies and services
 - Operational knowledge of income and estate taxes
 - Immense ability to understand client need and provide solutions to same
 - Good understanding of tax, trust, banking, credit, investment management, capital markets
 - Familiarity with departmental operations, policies and bank services
 - Sound ability to identify issues, interpret data and resolved all issues
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Professional Experience:

Wealth Manager

First Midwest Bank, Grand Rapids, MI
October 2008 – Present

- Analyzed business strategies and worked according to business guidelines.
- Determined client preferences and prepared necessary communication.
- Analyzed developed strategies and evaluated it on a regular basis and made changes.
- Coordinated with PRM staff and resolved all client issues.
- Ensured compliance to all procedures and effective implementation of all.
- Monitored strategies ensured adherence to all jurisdiction regulations.
- Maintained confidentiality of all client information and verified details on a regular basis.

Wealth Advisor

Union Bank, Grand Rapids, MI
August 2003 – September 2008

- Coordinated with clients and developed investment plans by analyzing client financial requirement.
- Assisted Personal Trust administrators and maintained effective relationships with clients and ensured achievement of all goals.
- Provided support to all client relationship.
- Monitored bank goals and assisted various associated in achieving company objectives.
- Maintained knowledge of various company products and services.

Wealth Strategist

Advantage Talent, Inc., Grand Rapids, MI
May 1998 – July 2003

- Organized all information and documented it.
 - Evaluated various financial scenarios and identified any alternatives in work.
 - Monitored strategies and ensured effective implementation for same.
 - Coordinated with capital Management managers and developed detailed investment plans.
 - Assisted local management and developed ways to retain customers.
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Education:

Bachelor's Degree in Finance
Rudolf Steiner College, Fair Oaks, CA

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