JOE BROWN

123.456.7890 | email@gmail.com | New York, NY | LinkedIn: Name

WEALTH MANAGEMENT RELATIONSHIP MANAGER / FINANCIAL ADVISOR

Leveraging expertise in private banking, wealth management, financial planning, and investments in the US and Switzerland to formulate strategies that open new opportunities and maximize financial performance for both clients and employers. Build and cultivate strong professional networks in US and European markets to identify industry trends and grow referral business. Excel in communicating vision to stakeholders and potential clients while representing employers at conferences and events.

CORE STRENGTHS: RELATIONSHIP MANAGEMENT – COMPREHENSIVE WEALTH MANAGEMENT – FINANCIAL PLANNING
LEADERSHIP – INTERNATIONAL MARKET EXPERTISE – HIGH NET WORTH INDIVIDUALS / CLIENT RELATIONSHIPS

HIGHLIGHTS OF QUALIFICATIONS

RELATIONSHIP BUILDING: Provide leadership in reaching and engaging international clients, expanding professional networks, and cultivating investor trust/confidence while participating in community groups and organizations. Captured $5M in business for ABC Company and $3M for ML Group during tenure.

BUSINESS GROWTH: Demonstrate excellence in securing and growing business operations for firms in the US and Europe. Gained and on-boarded two major banks from Luxembourg and Austria for Swiss Custody business in 2016, resulting in CHF 2.5B net new assets under custody for the Swiss domestic market.

CLIENT ACQUISITION: Drive business development by promoting firm’s ability to build wealth and investments. Defined a holistic market strategy for BTV Vier Lander Bank’s Swiss private banking business to expand market share in Switzerland and acquire new clients Europe, focusing on high net worth individual business.

PROFESSIONAL OVERVIEW

FINANCIAL ADVISOR/PARTNER | ABC COMPANY New York, NY | 2018-Present
ABC, founded in 1919, offers Private Wealth Management, Asset Management, Investment Banking/Capital Markets and Private Equity services with offices in North America, Europe, and Asia.

- Reach and engage international clientele, specializing in European and South American accounts; generated and manage upwards of $5M in closed business to date.
- Grow book of business by maintaining existing client relations while expanding professional network with professionals and COI’s in the industry, including estate planning attorneys, CPA’s, family offices, and global consultants.
- Participate in local and international organizations to grow network and generate new business, including Bonita Springs Chamber of Commerce, European American Network EAN Fort Myers, German American Business Chamber Chapter Miami, Swiss American Club of SW Florida, Alliance Francaise de Bonita Springs, and Estate Planning Council of Naples.

FINANCIAL ADVISOR & PORTFOLIO ADVISOR | ABC GROUP WEALTH MANAGEMENT New York, NY | 2017-2018
ABC Group is a wealth management division of Bank of America with $2T+ in assets under management.

- Built book of business by focusing on European clients in the US, specifically German, French, and Italian communities in Southwest, FL; captured more than $3M in closed business during tenure.
- Earned License 7 (General Securities Representative Brokerage Exam) and License 66 (Uniform Combined State Law Exam) as well as Florida Life and Health Insurance license.

SENIOR RELATIONSHIP MANAGER / SIX SECURITIES & EXCHANGES DIRECTOR | ABC GROUP LTD. Zurich, Switzerland | 2015-2017
ABC operates Switzerland’s financial market infrastructure and offers on a global scale comprehensive services in the areas of securities trading, clearing and settlement, as well as financial information and payment transactions.

- Improved overall customer experience by proactively anticipating client needs and working to optimize their profitability.
- Identified and maximized cross-selling and new business opportunities for SIX post-trade products and services requiring considerable support from internal stakeholders.

SENIOR RELATIONSHIP MANAGER / SIX SECURITIES & EXCHANGES DIRECTOR CONTINUED…

- Gained and on-boarded two major banks from Luxembourg and Austria for the Swiss Custody business in 2016, resulting in CHF 2.5B net new assets under custody for the Swiss domestic market.
- Developed and deployed strategy to improve client profitability across the European international client portfolio (ex UK); managed the division's European client portfolio, including one major US client.
- Assigned to manage the top client accounts in the firm and worked collaboratively with product management, sales, client support, and securities operations to address their requirements; formed strong client relationships to optimize service.

CO-FOUNDER & MANAGING DIRECTOR | ABC LLC — New York, NY | 2013-Present

Company operates a real estate investment/vacation rental business in the New York area. Currently manages five properties.

- Co-founded and built a vacation property business, overseeing all aspects of accounting, financial management, investment management, and taxes for the operation and each investment property.

HEAD PRIVATE BANKING SWITZERLAND | ABC BANK — St. Gallen Switzerland | 2007-2012

DIRECTOR, MEMBER OF THE MANAGEMENT BOARD | RELATIONSHIP MANAGER PRIVATE BANKING

A bank for affluent private clients and export-oriented corporate clients in Tyrol, Vorarlberg, Vienna, BadenWuerttemberg, Bavaria, and Switzerland. ABC is licensed in Austria, Switzerland, and Germany and offers a broad range of financial services.

- Owned accountability for development, management, and execution of effective sales strategy for the Swiss Private Banking unit; directed relationship management and wealth advisory, focusing on new business development, client acquisition, customer service, and ongoing return reference while cultivating strong relationships at all levels.
- Led 10 to 15 team members in all aspects of sales management, including driving sales initiatives, marketing campaigns, and sales channel development; ensured accurate and positive communications across the sales organization.
- Proved vital in growing assets under management $180M and increasing earnings from $3.8M to $5M in two years.
- Drove compliance to requirements and principles of good standing of the Swiss Financial Market Supervisory Authority (FINMA) while ensuring the operation passed all internal and external audits.
- Contributed to the development and execution of the Swiss Private Client Business' 2010 to 2015 strategy; implemented defined sales strategies aimed at acquiring German, Dutch, and Italian high net worth clients.
- Served as Relationship Manager for Private Banking, capturing $20M in new client assets between 2008 and 2010.
- Assumed leadership of junior relationship managers' training and mentoring program.

PRIOR: **ISN LINKS LIBRARY & NEWSLETTER MANAGER, ABC INSTITUTE OF TECHNOLOGY ZURICH**
ASSISTANT WEALTH MANAGEMENT, ASSOCIATE, ABC **ASSET MANAGEMENT**

EDUCATION

Executive MBA, General Management – COLLEGE UNIVERSITY OF APPLIES SCIENCES
Master Thesis: Investor Decisions in a Low-Interest Rate Environment – A Prospect Theoretical Approach

Master of Science, Political Science – COLLEGE UNIVERSITY

LICENSES & CREDENTIALS

Certified International Wealth Manager (CIWM) | Series 7 & 66 Licenses

Professional Certificate in Portfolio Management – INSTITUTE, SWITZERLAND

Professional Certificate in Business Management & Academic English Program – UNIVERSITY OF STATE

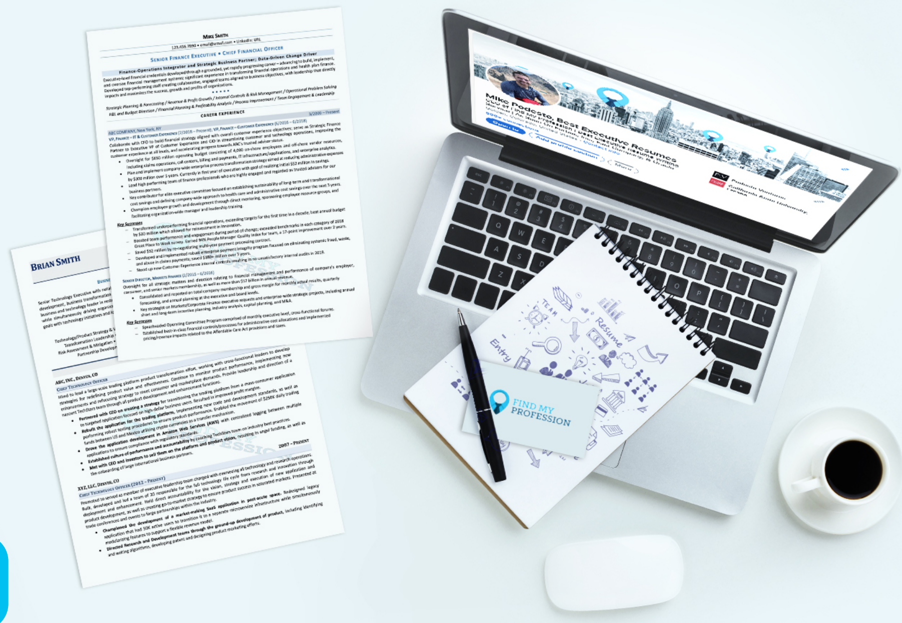
Federal Diploma for Expertise in Finance & Investments – ABC CONFEDERATION

PERSONAL PROFILE

Swiss Nationality | US Green Card | Fluent English & German, Proficient French & Italian, and Basic Spanish

FIND MY PROFESSION

Do You Need More Help With Your Resume?



See how we can help! >

EVERY EXECUTIVE RESUME INCLUDES:

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- ATS and 6-second test optimization
- Fully customizable Word and PDF versions
- Unlimited revisions
- One-on-one strategy call with your resume writer
- 3-5 business day turnaround
- 60-Day Interview Guarantee

60-DAY INTERVIEW GUARANTEE

See Packages and Pricing >

Trustpilot	sitejabber	Google Reviews	Facebook
4.9/5 stars, **440+** reviews	**4.9**/5 stars, **275+** reviews	**5**/5 stars, **140+** reviews	**5**/5 stars, **50+** reviews

Contact us M-F 9:00am - 5:00pm ET

by emailing help@findmyprofession.com or by calling 831-888-0967