**Rebecca Adams**

Financial Advisor

+1 (234) 567-8900

1234 SW 40 St, City, State, Country 12345

username@domain.com

www.your-domain.com

**Education**

Bachelor/Degree

University, Location

2003 - 2007

Bachelor/Degree

University, Location

2012 - 2014

**Certifications**

Certification Title

Institution, Location

2006

**Skills**

Adobe Creative Cloud

HTML / CSS

Microsoft Office

Canva / Sketch

**Professional Experience**

Position, Company, 2003 - 2007

Managed investment portfolios for more than 400 clients with over $17 million in assets under care. Conducted equity research on companies to discover undervalued investments with reasonable prospects for long term sustainable growth.

Position, Company, 2007 - 2011

Coordinated portfolio reviews with clients to regularly evaluate an investment's performance toward achieving documented long-term financial goals. Presented investment and financial planning seminars to clients and prospective clients.

Position, Company, 2011 - 2016

Generated new clients using a personal, face-to-face approach that built trust and emphasized personal service to the individual investor. Managed an office environment by collaborating with an assistant to ensure a functioning office.

Position, Company, 2016 - present

Identified clients and prospective clients in need of investment guidance and then recommended investment solutions appropriate for each individual. Prepared an Excel based financial forecast for a $60 million green-field industrial project.

**References**

Jimmy Nelson

Organization.

+1 (234) 567-8900. username@domain.com

Paul Washington

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