

Jasmine A. Chen

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SUMMARY

Results-driven Financial Advisor with over 5 years of experience in wealth management and portfolio analysis. Proven track record of enhancing client satisfaction and achieving financial goals through tailored financial strategies.

EXPERIENCE

Senior Financial Advisor

Jan 2022 - Present

Wealth Management Group, Austin, TX

- Increased client portfolio value by 30% within 12 months by implementing personalized investment strategies.
- Achieved a 95% client retention rate through proactive communication and regular portfolio reviews.
- Utilized financial planning software (e.g., eMoney Advisor) to create comprehensive financial plans and forecasts.

Financial Advisor

Jun 2018 - Dec 2021

Global Finance Advisors, Houston, TX

- Managed a portfolio of over 100 clients with an average asset under management of \$10 million.
- Developed investment strategies that boosted client returns by an average of 15% year-over-year.
- Conducted market analysis and used CRM tools (Salesforce) to enhance client engagement and improve service delivery.

Junior Financial Analyst

Jul 2016 - May 2018

Capital Investment Solutions, Dallas, TX

- Supported senior advisors in analyzing investment opportunities, resulting in a 20% increase in profitable recommendations.
- Assisted in preparing over 50 comprehensive financial reports for clients, improving transparency and trust.
- Utilized Microsoft Excel for data analysis and financial modeling, enhancing reporting accuracy.

EDUCATION

Bachelor of Science in Finance

May 2018

University of Texas at Austin, Austin, TX • GPA: 3.7

SKILLS

Technical Skills: Financial Planning, Investment Strategies, Risk Management, Portfolio Analysis

Tools & Frameworks: eMoney Advisor, Salesforce, Microsoft Excel, Bloomberg Terminal