

Amina Patel

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SUMMARY

Results-driven Senior Financial Advisor with over 10 years of experience in wealth management and investment strategies. Proven track record of increasing client portfolios by an average of 25% annually through tailored financial planning and risk assessment.

EXPERIENCE

Senior Financial Advisor

Jan 2022 - Present

Wealth Management Group, San Francisco, CA

- Increased client portfolio performance by 30% over two years by optimizing investment strategies and asset allocation.
- Developed comprehensive financial plans for high-net-worth clients, resulting in a 95% client satisfaction rate.
- Implemented advanced financial modeling techniques using Excel and Monte Carlo simulations to assess risk and return.

Financial Advisor

Jun 2018 - Dec 2021

Financial Solutions Inc., Los Angeles, CA

- Managed a diverse client base, achieving a 20% growth in assets under management (AUM) within three years.
- Conducted market analysis and identified investment opportunities that led to a 15% increase in client returns.
- Utilized CRM software to enhance client relationships and streamline portfolio management processes.

Junior Financial Analyst

Aug 2015 - May 2018

Capital Advisors, New York, NY

- Assisted in the development of investment strategies that improved portfolio performance by 10% year-over-year.
- Prepared detailed financial reports and presentations for senior advisors and clients, enhancing decision-making processes.
- Conducted risk assessments and supported clients in diversifying their investment portfolios.

EDUCATION

Bachelor of Science in Finance

May 2018

University of California, Berkeley, Berkeley, CA • GPA: 3.7

SKILLS

Technical Skills: Financial Planning, Investment Analysis, Risk Management, Client Relationship Management

Tools & Frameworks: Bloomberg Terminal, Morningstar Direct, Excel (Advanced), Salesforce