

## Professional

Level 7 of the  
stockbroking  
basis. Pos

Utilising my c  
achieved 2 pr  
my client bas  
form trusted  
receiving com

## Core Skills

- Portfolio
- Advising
- Asset
- Client

## Career

**Oct 2015**

### Outline

Took vol  
base (as  
staff sho

Recentl

**Apr 19**

**Oct 20**

### Outline

Led 1  
base o  
Divisi

### Key P

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client  
managed  
espoke

min in which I  
d retention of  
nate ability to  
by personally

funds  
ETFs  
management  
compliance

enlarged client  
h gap but due to

ge is up to date.

portfolios for a client  
t reporting line to

nd client  
my clients.  
s and professional

investment trusts, cash

or retail clients.  
ude to risk and  
y, asset allocation and

s part of the new

## Key Achievements/Projects

- Grew my...
- did howev...
- Successf...
- new integ...
- Negotiate...
- Converte...
- from the...
- Promote...
- Achieve...

**Jan 2004 – Oct**

### *Outline*

Portfolio mana  
advisory dealin

**Apr 1998 – Jan**

### *Outline*

Supported the  
knowledge via

## Education

- BA (

## Profess

- Ass  
Pro

## Refere

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