

# James Jones | Financial Advisor

Location: xxxxxxxx

Telephone: xxxxxxxxxxxx

Email: xxxxxxxxxxxxxxxxx

## Professional Summary

An accomplished professional with 16 years of experience in the financial services industry.

A highly ambitious and motivated individual, client, swiftly moving from short-term to long-term. Displaying a strong ability to effectively communicate and adapt style to suit the needs of the client.

Successful in achieving all targets.

Knowledge of each and long-term and long-term, careful communication and decision making.

## Core Skills

- Devising and implementing financial strategies
- Conducting financial analysis and research
- Tailoring financial products to client needs
- Presenting financial proposals and reports
- Updating financial plans and portfolios
- Maintaining accurate financial records
- Working closely with clients and colleagues
- Building strong relationships with clients

Setting and goals

proposal

services

legislation

fund managers

## Career History

### 2016 – Present

#### Outline

Currently working out of their W

ent, working out of

#### Key Responsibilities

- Establishing a strong relationship with clients
- Attending to client needs and providing a high level of service
- Managing client portfolios and investment strategies

nder a month  
ng introductory  
ortunities for  
s  
ement, investment,

### 2011 – 2016

#### Outline

Head of the street building society, which was a

street building society,

#### Key Responsibilities

- Managing a broad range of individuals
- Managing a portfolio of 6 (chosen from 400) on a basis
- Managing the Office to ensure a full range of services at all times
- Managing the financial planning and complex cases
- Managing the Planning Manager

ning to a broad range  
individuals  
6 (chosen from 400  
basis  
Office to ensure a full  
at all times  
the financial planning  
complex cases  
Planning Manager

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2001 – 2011

Bank

#### Outline

After joining x in a  
performance, and

2009 – 2011

- Returned to a  
pensions), and  
company's in  
of commerci

2007 – 2009

- Assumed re  
significantly
- Successful  
providing a  
skills of ex
- Led the im  
compliance

2004 – 2007

- Provided  
underwrit
- Reviewed  
securing

2001 – 2004

- Demonstrated  
customer
- Promoted

1999 – 2000

1997 – 1998

#### Profes

- CelM
- CII I
- Vari
- NVC
- GC

#### Refere

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