**Your Name Here**

6110 Macinness Drive

Toms River, NJ 08753

908-555-4458

**Synopsis:** Over 10 years of progressive experience and responsibility with documented success in planning, scheduling, training development, quality assurance programs and financial and human resources management.

**Objective:** An entry-level position in financial planning services with opportunity for advancement to management.

**Education:** **Clarence College of Business** **Lawrenceville, NJ**

 *Bachelor of Business Administration in Finance* 1996

**Experience:** **Personal Financial Advisor** **Your Employer**

 Employer City 2001 to Present

 Researched and investigated available investment opportunities to determine whether they fit into financial plans.

 Interviewed clients to determine their current income, expenses, insurance coverage, tax status, financial objectives, risk tolerance, and other information needed to develop a financial plan.

 Contacted clients periodically to determine if there had been changes in their financial status.

 **Personal Financial Advisor** **Your Employer**

 Employer City 2000 to 2001

 Explained to individuals and groups the details of financial assistance available to college and university students, such as loans, grants, and scholarships.

 Implemented financial planning recommendations, and referred clients to someone who can assist them with plan implementation.

 **Personal Financial Advisor** **Your Employer**

 Employer City 1997 to 1998

 Answered clients' questions about the purposes and details of financial plans and strategies.

 Reviewed clients' accounts and plans regularly to determine whether life changes, economic changes, and financial performance indicate a need for plan reassessment.

**Reference:** Available upon request.