

## INVESTMENT ADVISOR

*Portfolio Management, Client Services, Financial Planning*

Highly accomplished and results-driven Finance Executive with over 20 years of successful new business development, competitive market share expansion, and business leadership experience. Leverages finely-honed interpersonal and time management skills to successfully manage an account and increase market value achieving corporate goals and objectives. Energetic and goal-oriented with a genuine passion for investment strategy and a well-rounded background in supporting a progressive organization in optimizing performance and growth. Astute communicator and presenter adept at establishing rewarding relationships to benefit business development.

### AREAS OF EXPERTISE

- ◆ Investment Strategies
- ◆ Market Growth & Expansion
- ◆ Relationship Building
- ◆ Asset Management
- ◆ Market Analysis & Penetration
- ◆ Client/Investor Relations
- ◆ Portfolio Management
- ◆ Strategic Business Planning
- ◆ Cross-selling
- ◆ New Business Development

### CORE COMPETENCIES

- ✓ Highly skilled in creating sound investment solutions, developing high-levels of market growth, and facilitating effective financial management strategies to increase portfolio value.
- ✓ Proven ability to effectively handle multi-task levels of management responsibility with minimal direction from superiors while supervising personnel, providing team leadership, motivation, and development.
- ✓ Solid communication, interpersonal, time management, analytical, organizational, and leadership skills.
- ✓ Go-getter attitude with an ability to easily grasp new ideas, concepts, methods and investment techniques.
- ✓ Experienced in forecasting, account performance analysis, investor relations, market research, financial planning, and networking.

### PROFESSIONAL PROFILE

**JP MORGAN BANK** · New York, NY

**1990 – Present**

#### *Vice President*

*Assumes full responsibility for overseeing trust and investment management accounts valued at over \$360M in market value while continuously identifying, specifying, and reconfirming investor objectives.*

#### **Key Accomplishments**

- ⇒ Received Service Star Award in Q1 of 2003 and Outstanding Performance Valuation throughout tenure
- ⇒ Secured \$60M in business relationships with focus on performance and customer service

### EDUCATION AND TRAINING

#### **FORDHAM UNIVERSITY**

MBA IN FINANCE (2001)

#### **ST. FRANCIS COLLEGE**

B.S. IN BUSINESS MANAGEMENT