



Benjamin Harris

ABOUT ME

A business development manager with 12 years of experience driving revenue growth, managing high-net-worth client relationships, and securing financial service partnerships. A strong expertise in investment products, wealth management solutions, and risk assessment strategies.

PROFESSIONAL EXPERIENCE

Business Development Manager – Financial Services

Prestige Wealth Management, New York, NY | May 2018 - Present

- Developed and maintained relationships with high-net-worth individuals, increasing managed assets by over \$150 million in five years
- Led strategic initiatives to expand financial product offerings, boosting revenue by 35% through investment portfolio diversification
- Negotiate partnership agreements with private equity firms, increasing investment opportunities for top-tier clients

Wealth Management Associate

Sterling Financial Group, New York, NY | July 2013 - May 2018

- Built a portfolio of 75+ high-net-worth clients, contributing to a 40% increase in firm-wide assets under management
- Conducted financial planning sessions that improved client retention by 30% over six years
- Developed risk assessment models to optimize client investments, improving portfolio performance by an average of 15%

CERTIFICATIONS

- Certified Financial Planner (CFP), Certified Financial Planner Board of Standards, February 2016

CONTACT



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LinkedIn | Portfolio



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EDUCATION

Bachelor of Science (B.S.) in Finance

Columbia University, New York, NY
January 2010 - June 2013

KEY SKILLS

- Financial product sales
- Wealth management solutions
- High-net-worth client acquisition
- Risk assessment and compliance
- Market trend analysis