Riley Anderson

Wealth Management Advisor

CONTACT INFORMATION

(555) 000-0000

email@example.com

City, ST

EDUCATION

- Bachelor of Science in Finance | May 2013
  State University, City, ST

KEY SKILLS

- Portfolio construction and strategic asset allocation
- Tax-efficient financial planning and optimization
- High-net-worth client relationship management
- Investment performance benchmarking and reporting
- Estate and trust planning coordination
- Financial plan design and retirement analysis
- Client acquisition through seminars and referrals
- Alternative investment evaluation and allocation
- Regulatory compliance (FINRA, SEC, fiduciary standards)

ABOUT ME

Trusted wealth management advisor with 8+ years of experience designing investment strategies and financial plans for high-net-worth individuals. Grew managed assets from $200M to $450M achieving 12% annualized returns vs. an 8% benchmark, developed financial plans for 120+ clients increasing retention to 98%, and contributed $30M in new assets through educational seminars at Prestige Private Bank and Horizon Investments. Expert in portfolio construction, tax-efficient planning, estate coordination, and maintaining the deep client relationships that drive long-term AUM growth.

PROFESSIONAL EXPERIENCE

Senior Wealth Advisor | Prestige Private Bank I City, ST
January 2017 – Present

- Grew managed assets from $200M to $450M over 6 years, delivering 12% annualized returns compared to the benchmark 8% through disciplined asset allocation and active tactical positioning
- Developed customized comprehensive financial plans for 120+ high-net-worth clients covering investment, retirement, estate, and tax planning, increasing client retention rate to 98%
- Conducted quarterly portfolio reviews and tax-planning sessions, implementing tax-loss harvesting, Roth conversion, and charitable giving strategies that reduced average client tax liabilities by 10%
- Sourced and onboarded 25 new HNW clients annually through referrals, professional network development, and client events, adding an average of $30M in new AUM per year
- Presented alternative investment opportunities including private equity, hedge funds, and structured notes to qualified clients, allocating $45M to alternatives to enhance risk-adjusted returns
- Collaborated with estate attorneys, CPAs, and insurance advisors on comprehensive wealth planning engagements for 30+ multi-generational client families, generating $2.5M in annual fee revenue

Associate Financial Advisor | Horizon Investments I City, ST
June 2013 – December 2016

- Supported senior advisors in managing $150M in client assets, co-authoring investment proposals and performance analysis reports presented to the firm's top 50 client relationships
- Onboarded 60 new clients through educational investment seminars and community financial planning events, contributing $30M in new assets under management over a 3-year period
- Built and maintained detailed financial models for 40+ client portfolios covering asset allocation, Monte Carlo projections, and withdrawal planning for pre- and post-retirement clients
- Researched and presented 15 new investment product recommendations to the senior advisory team, including 4 that were adopted into client portfolio models and drove performance improvements