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Allison Rosenberg

Banker

Senior banker with 10+ years of experience managing high-net-worth portfolios, conducting risk assessments, and driving revenue growth through consultative sales. Consistently exceeded financial targets by 15%+, reduced potential losses by 20% through detailed risk analysis, and increased client retention by 30% at XYZ Financial Services. Credentials include CFA, CFP, and FRM designations. Expert at building long-term client relationships and translating complex financial strategies into clear investment decisions.

Location

Detroit, MI

Phone

(555) 000-0000

Email

email@example.com

Education

Harvard Business School, Boston, MA

Master of Business Administration, Concentration in Finance

University of Pennsylvania - The Wharton School, Philadelphia, PA

Bachelor of Science in Finance

Key Skills

- High-net-worth portfolio management
- Risk assessment and loss mitigation
- Consultative sales and client development
- Investment strategy and financial planning
- Financial analysis and modeling
- Client retention and relationship management
- Business development and prospecting
- Strategic planning and goal setting
- Regulatory compliance and reporting

Professional Experience

Senior Banker, XYZ Financial Services | Philadelphia, PA

June 2018 - Present

- Manage a diverse portfolio of 80+ high-net-worth clients with combined AUM of \$45M, consistently exceeding quarterly financial targets by over 15% for 5 consecutive years
- Conduct detailed risk assessments for all client financial decisions, implementing mitigation strategies that reduced potential portfolio losses by 20% year-over-year
- Foster and maintain strong client relationships through proactive quarterly reviews and personalized financial planning, increasing retention from 78% to 98% over 4 years
- Identify and develop new business opportunities through referral networks and community events, adding \$8M in net new assets over a 12-month period
- Lead investment strategy discussions with clients on equity, fixed income, and alternative allocations, delivering portfolio performance averaging 12% annually vs. a benchmark of 9%
- Mentor 3 junior bankers on consultative sales techniques and portfolio construction fundamentals, contributing to a 22% improvement in team-wide revenue metrics

Associate Banker, LMN Bank | Boston, MA

May 2015 - June 2018

- Directed a book of 60+ client accounts, providing financial advice and executing investment decisions that increased average portfolio value by 25% over the 3-year tenure
- Assessed financial risks for each client account including credit, market, and concentration risk, implementing adjustments that reduced potential losses by 18%
- Built strong client relationships through responsive service and proactive communication, increasing client satisfaction scores by 20% on annual survey benchmarks
- Collaborated with senior bankers on complex financial planning cases including estate planning, tax optimization, and trust structures for ultra-high-net-worth clients

Professional Development

- Chartered Financial Analyst (CFA) | CFA Institute
- Certified Financial Planner (CFP) | Certified Financial Planner Board of Standards
- Financial Risk Manager (FRM) | Global Association of Risk Professionals