SAMPLE RESUME

JOHN BUCK DOE

123 Amber Road (303) 867-5309
Anywhere, CO 80001 Jdoe35@abc.com

PROFILE

Dynamic and motivated M.B.A. candidate with seven years of client services management in the financial services industry. Customer-oriented professional who successfully creates long-term relationships with key clients. Passionate about team development and success. Proven track record of significantly increasing returns on customer portfolios.

Areas of Expertise:

- Relationship Management and Business Development
- Financial Analysis, Valuation and Management
- Strong PC skills (including MS Excel and Access), and proficiency in Spanish

PROFESSIONAL EXPERIENCE

ABC Corporation, Denver, CO 2003 – Present

Regional, publicly traded financial services firm specializing in asset management for high net worth individuals and small businesses in Colorado, Wyoming, Utah, and New Mexico.

Director of Client Services

- Manage portfolios for 50 high income clients for regional financial services firm
- Ranked as #1 producer in company for 2004
- Communicate directly with clients and advise regarding investment opportunities, creating long-term relationships with customers
- Create an average 20% return on client portfolios
- Supervise and train staff of 5 client service managers, teaching them nuts and bolts of industry, communication skills and fundamentals of financial planning
- In first quarter after completion of training course, client service managers increased return on portfolios by 15%

You Profit Company, Arvada, CO 2000 – 2003

Privately owned, start-up financial services firm serving Colorado's Front Range. Was recruited by founder to develop and grow the Denver office. Company was acquired by ABC Corporation in 2003.

Client Services Manager

- Built client portfolio from 10 middle income clients to 100 in local financial services firm
- Communicated directly with clients and advised regarding investment opportunities, creating long-term relationships with customers
- Earned highest possible marks on all customer satisfaction surveys
- Recognized as "Client Services Manager of the Year" in 2001 and 2002
- Created average 15% annual return on client portfolios
- Because of success with client portfolios, assigned by senior management to work with low performing portfolios
- Achieved 10% return on low performing portfolios in first six months

SAMPLE RESUME

Premium Financial Services, Boise, ID 1998 – 2000
Northwest-based regional financial services firm.
Client Services Representative

- Developed client base of 25 middle income clients for local, start-up financial services company
- Counseled clients on investment strategies.
- Earned highest possible marks on client satisfaction surveys
- Achieved average 20% annual return on client portfolios after first year

EDUCATION

Daniels College of Business, University of Denver, Denver, CO August 2005
Ranked by the Wall Street Journal as a Top 10 Finance school in 2005
Master of Business Administration Candidate - Finance, GPA 3.95
Master of Science Candidate – Marketing, GPA 3.50

University of Idaho, Moscow, ID May 1998
Bachelor of Science - Business Administration, GPA 3.80

ACHIEVEMENTS AND ACTIVITIES

- Wrote article for the *Journal of Financial Planning* in August 2002 titled, "The Winning Strategy: Excellent Customer Service"
- Presented workshop at 2003 national conference of the National Association of Personal Financial Advisors titled, "Realizing Your Client's Dreams: How to Evaluate and Turn Around Low Performing Portfolios"
- Presented workshop at 2004 national conference of the National Association of Personal Financial Advisors titled, "How to Maintain Customer Loyalty"
- Vice-President, Optimist Club of North Metro Denver
- Member, Metro Denver Chamber of Commerce
- Member, Denver Estate Planning Council
- Volunteer mentor for Big Brothers, (1999-2003)
- Volunteer for Multiple Sclerosis Walkathon (2001-present)
- Avid hiker; have reached the summit of 23 of Colorado's 14,000 foot peaks