

Danielle Dandria

777 Seventh Street, St. Louis, MO 77777
d.dandria@email.org
(111) 111-1111

A detail-oriented financial advisor with a proven track record of keeping clients satisfied. Regularly beats average returns and is knowledgeable regarding many industry-standard software systems. Diligent about assessing clients' goals, then adjusting plans as necessary to meet them. Clear and thorough communicator over written and verbal channels.

Education

Bachelor of Science in Accounting
St. Louis University, St. Louis, MO
September 2013 - June 2017

Master of Science in Financial Analysis
Kansas School of Business,
Kansas City, KS
September 2017 - June 2019

Key Skills

- MoneyGuidePro, eMoney Advisor and Quickbooks software
- Stock and bond research, including through the EDGAR database
- One-on-one and group-based communication
- Tax analysis

Certifications

- Personal Finance Specialist, National Association of Personal Financial Advisors, 2020

Professional Experience

Financial Advisor

Kansas Consultancy, Kansas City, KS | July 2019 - Present

- Identify undervalued investments, generating annualized ROI 4% higher than the consultancy's average
- Execute trades on behalf of 50+ clients and manage over \$100 million in assets
- Conduct initial assessment meetings and regular follow-ups, contributing to a client satisfaction rating of 99%
- Advise clients on tax considerations such as charitable contributions and personal deductions
- Create long- and short-term financial plans and roadmaps for clients

Financial Advisor Intern

RSR Advisors, Kansas City, KS | March 2019 - June 2019

- Researched and reported on tax changes, in one case identifying \$3,000 in newly deductible expenses for a client
- Prepared presentation slides for supervising financial advisor's meetings with clients
- Screened 50+ new clients and scheduled initial assessments
- Conducted risk-tolerance assessments for new and existing clients
- Created reports on 12 exchange-traded funds and 36 mutual funds