

# ANDREA KLINE

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Detailed and dedicated personal financial advisor interested in helping clients achieve their financial goals. Specialized in traditional and Roth IRAs and emerging cryptocurrency markets. Proven ability to communicate complex financial concepts to clients and relate to their specific needs. Experienced conference speaker and financial workshop leader.

## PROFESSIONAL EXPERIENCE

### SENIOR PERSONAL FINANCIAL ADVISOR

Smith & Associates, New Orleans, LA | June 2015 - Present

- Assist in the creation of a cryptocurrency investment department to handle niche client needs and expand their portfolios
- Increase annual sales of insurance products by over 15%
- Work with clients to establish tax-advantaged retirement assets and closely monitor portfolio performance

### PERSONAL FINANCIAL ADVISOR

KPI Wealth Management, Portland, ME | June 2013 - May 2015

- Achieved investment returns for clients with a 6% increase over the industry average
- Wrote comprehensive and personalized financial plans for clients and consistently followed up on their progress
- Created a streamlined process for developing financial reports that resulted in a 10% annual cost-savings

## EDUCATION

### BACHELOR OF SCIENCE IN ACCOUNTING

Columbia University, New York, NY | September 2009 - May 2013

## KEY SKILLS

- Technical skills: QuickBooks, Microsoft Office, MoneyLine
- Quantitative data analysis
- Debt management
- Communication

## CERTIFICATIONS

- Series 7 license, FINRA, 2013