FINANCIAL CONSULTANT

Self-motivated, highly reliable financial sales executive, with proven competencies in telephone sales, contracts and investing. Detail-oriented and passionate about providing clients with their needs and wants, throughout the complete sales cycle. Adept at "thinking on my feet" to meet challenges head on, resolving complex problems and adapting quickly to changing priorities.

Key qualifications include:

- Financial Services
- Investment Planning
- Portfolio Management
- Securities
- Microsoft Office Suite
- Thomson Financial and Beta Back Office
- NFS Streetscape
- Pershing Net Exchange Pro/Netx360
- Solution Selling
- Negotiation
- Relationship Development
- Cold Calling

PROFESSIONAL EXPERIENCE

FINANCIAL CONSULTANT/ REGISTERED PRINCIPAL

Brecek & Young Advisors/ Toronto, ON / July 07 - Present

Responsible for corresponding with Branch Manager with regards to supervising and guiding staff towards exceeding performance plans. Identify and recruit top-talented finance professionals and assist with training, to develop abilities and industry knowledge. Prospect new clients nationwide, by telephone, in an inside sales environment, exhibiting strong listening and solution-selling skills, by quickly reacting to client demands.

Selected Accomplishments:

- Implement Financial Selling Strategies - Out of 200 consultants, closed the second most new contracts. Over a two year period, developed a nationwide account base from scratch, worth over 2 million dollars, by utilizing relationship building methods to secure ongoing business opportunities and, investment knowledge to increase portfolio values.

ACCOUNT EXECUTIVE/ REGISTERED PRINCIPAL

J.P. Turner & Company/ Toronto, ON / April 06 - July 07

Prospected new clients throughout Canada to develop a substantial client base. Managed investment portfolios ensuring financial objectives are met. Assisted with the hiring and developmental process of staff members, as well as, provided management functions to ensure financial executives adhered to company policy and guidelines.

Selected Accomplishments:

- Demonstrated Knowledge of Financial Services and Products – Developed the trust of clients by showcasing exceptional understanding of investment strategies, enabling the possibility of recommending financial solutions while up-selling and cross-selling clients on various products and services.