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| Jane Smith | | |
| Summary  Dedicated financial advisor with over 5 years of experience in providing tailored investment advice and portfolio management for diverse clientele. Proven track record of increasing client assets and satisfaction.  Work Experience  **Financial Advisor Jan 2020 – Present**  LMN Wealth Management Chicago, IL   * Managed a portfolio of over $50 million in assets, achieving a 15% growth rate annually. * Developed personalized financial plans leading to a 30% increase in client retention.   **Associate Financial Consultant Jun 2017 – Dec 2019**  DEF Financial Group Chicago, IL   * Assisted senior advisors in creating comprehensive investment strategies for clients. * Conducted regular portfolio reviews, ensuring alignment with client goals and market trends.   Education Bachelor of Arts: Economics May 2017 *Northwestern University**Evanston, IL*  certifications   * Certified Financial Planner (CFP) – CFP Board – 2019 * Series 65 – FINRA – 2018 | Contact  (987) 654-3210  jane.smith@example.com  Chicago, IL 60601  Skills  Portfolio Management  Investment Planning  Risk Assessment  Financial Modeling  Client Retention  Tax Planning  Financial Regulations  Negotiation Skills |