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| Jane Smith |
| SummaryDedicated 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.

EducationBachelor of Arts: Economics May 2017*Northwestern University**Evanston, IL*certifications* Certified Financial Planner (CFP) – CFP Board – 2019
* Series 65 – FINRA – 2018
 | Contact(987) 654-3210jane.smith@example.comChicago, IL 60601SkillsPortfolio ManagementInvestment PlanningRisk AssessmentFinancial ModelingClient RetentionTax PlanningFinancial RegulationsNegotiation Skills |