

Jim Jones

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Financial Advisor with 7+ years of experience delivering financial/investment advisory services to high value clients. Proven success in managing multi-million dollar portfolios, driving profitability, and increasing ROI through skillful strategic planning, consulting, and financial advisory services.

Professional Experience

Senior Financial Advisor

Wells Fargo Advisors, Houston, TX

From August 2020 to Present

- Deliver financial advice to clients, proposing strategies to achieve short- and long-term objectives for investments, insurance, business and estate planning with minimal risk
- Develop, review, and optimize investment portfolios for 300+ high value clients with over \$190M AUM (Assets Under Management)
- Ensure maximum client satisfaction by providing exceptional and personalized service, enhancing client satisfaction ratings from 88% to 99.9% in less than 6 months
- Work closely with specialists from multiple branches, managing investment portfolios for over 800 clients with over \$25M in assets under care

Financial Advisor

Suntrust Investment Services, Inc., New Orleans, LA

From July 2017 to August 2020

- Served as knowledgeable financial advisor to clients, managing an over \$20.75M investment portfolio of 90+ individual and corporate clients
- Devised and applied a new training and accountability program that increased productivity from #10 to #3 in the region in less than 2 year period
- Partnered with cross-functional teams in consulting with clients to provide asset management risk strategy and mitigation, which increased AUM by 50%

Education

Louisiana State University

Baton Rouge, LA, United States

2010 - 2014

Bachelor's of Science, Finance

Additional Skills

- Proficient in MS Office (Word, Excel, PowerPoint, Outlook)
- Salesforce
- TFS Project Management
- Fluent in English, Spanish, and French