Daia Staas

Client Advisor

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(950) 160-0363
1234 Maple Street, Grand Rapids, MI 49503

Profile

Dedicated Client Advisor with 1 year of experience providing exceptional customer service, fostering client relationships, and offering tailored financial solutions. Combines strong communication skills with a keen ability to identify client needs, ensuring satisfaction and promoting loyalty. Adept at multitasking, problem-solving, and maintaining a professional attitude in fast-paced environments. Committed to continuous growth and staying informed on industry trends to provide the best possible advice and support to clients.

Employment History

Senior Client Advisor at Merrill Lynch Wealth Management, MI

Mar 2023 - Present

- Successfully managed a portfolio of over $200 million in assets, consistently achieving an annual growth rate of 8% and contributing significantly to the company's overall performance.
- Implemented tailored wealth management strategies for high-net-worth clients, resulting in a 15% increase in client satisfaction rates and a subsequent 20% growth in new client referrals.
- Led a team of 5 junior advisors, providing mentorship and guidance that led to a 25% increase in their individual performance metrics and helped secure over $50 million in new investments.
- Streamlined internal processes and implemented new CRM tools, reducing client response time by 30% and increasing overall team efficiency by 20%.

Client Advisor at Morgan Stanley Wealth Management, MI

Aug 2022 - Jan 2023

- Increased client portfolio value by 25% within two years, through strategic investment planning and diversification, resulting in over $5 million in additional assets under management for Morgan Stanley Wealth Management.
- Successfully onboarded 50 new high-net-worth clients within the first year, expanding the company's market share in Michigan and contributing to a 15% increase in revenue for the local branch.
- Developed and implemented a comprehensive financial education program that reached over 200 clients, improving overall client satisfaction rates by 30% and leading to a 20% increase in client referrals.

Certificates

Certified Financial Planner (CFP)

Jun 2022

Education

Bachelor of Arts in Business Administration and Client Relations at University of Michigan, Ann Arbor, MI

Aug 2018 - May 2022

Relevant Coursework: Business Strategy, Marketing, Organizational Behavior, Financial Management, Operations Management, Business Ethics, Human Resources, Client Relationship Management, Business Communications, and Project Management.

Links

linkedin.com/in/daiastaas

Skills

- Salesforce proficiency
- Zendesk expertise
- Financial analysis
- Conflict resolution
- Relationship building
- Product knowledge
- Time management

Languages

- English
- Italian