

# Blanca Gucciardo

Client Associate

## Profile

Client Associate with 1 year of experience in providing exceptional customer service and supporting financial advisors in managing client portfolios. Proficient in managing account documentation, maintaining client records, and processing transactions. Adept at building strong client relationships and collaborating with colleagues to achieve business objectives. Skilled in various financial tools and software, with a strong commitment to maintaining client confidentiality and adhering to regulatory compliance.

## Employment History

### Client Associate at Edward Jones, MO

May 2023 - Present

- Successfully managed a client portfolio of over \$50 million, resulting in a 15% increase in assets under management over a two-year period.
- Streamlined client onboarding processes, reducing account opening time by 25% and increasing overall client satisfaction by 10%.
- Developed and implemented a targeted marketing campaign that attracted 30 new high-net-worth clients, contributing to a 20% growth in revenue for the branch.

### Associate Client Associate at Wells Fargo, MO

Sep 2022 - Apr 2023

- Successfully managed a portfolio of over 150 high-net-worth clients, resulting in a 20% increase in assets under management and contributing to the team's overall growth by \$50 million within one year.
- Streamlined client onboarding processes and implemented new CRM system, reducing the average onboarding time by 30% and improving client satisfaction scores by 15%.
- Exceeded annual sales targets by 25%, generating over \$200,000 in new business revenue through effective cross-selling and relationship-building efforts with existing clients.

## Education

### Bachelor of Arts in Business Administration at University of Missouri, Columbia, MO

Aug 2018 - May 2022

Relevant Coursework: Financial Accounting, Managerial Accounting, Marketing, Operations Management, Business Strategy, Organizational Behavior, Human Resources, Business Communications, Business Ethics, and Corporate Finance.

## Certificates

### Certified Client Service Specialist (CCSS)

Mar 2022

## Details

[blanca.gucciardo@gmail.com](mailto:blanca.gucciardo@gmail.com)

(480) 002-5617

123 Maple Street, St. Louis, MO 63101

## Links

[linkedin.com/in/blancagucciardo](https://www.linkedin.com/in/blancagucciardo)

## Skills

Salesforce proficiency

Excel mastery

QuickBooks expertise

PowerPoint creation

Adobe Acrobat manipulation

CRM navigation

Microsoft Teams collaboration

## Languages

English

Indonesian

## Hobbies

Photography

Gardening

Playing a musical instrument