Juliette Skapik

External Wholesaler

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(179) 693-3783
123 Peachtree St, Atlanta, GA 30303

EDUCATION

Bachelor of Business Administration in Finance or Marketing at University of Georgia, Athens, GA

Sep 2017 - May 2021

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Investment Analysis, Financial Markets, Marketing Principles, Consumer Behavior, Marketing Research, and Strategic Marketing Management.

LINKS

linkedin.com/in/julietteskapik

SKILLS

- Salesforce proficiency
- Market analysis
- Relationship building
- Product knowledge
- Presentation skills
- Territory management
- Negotiation expertise

LANGUAGES

- English
- German

HOBBIES

- Golfing

PROFILE

Results-driven External Wholesaler with 2 years of experience in cultivating and nurturing long-lasting relationships with financial advisors and institutions. Proficient in developing tailored investment solutions, driving territory growth, and providing exceptional sales support. Adept at identifying business opportunities, fostering strategic partnerships, and delivering superior customer service to maximize sales revenue and achieve organizational goals.

EMPLOYMENT HISTORY

External Wholesaler at Invesco, GA

Feb 2023 - Present

- Generated $250 million in new assets under management by establishing and maintaining relationships with over 100 financial advisors across Georgia, resulting in a 20% increase in regional revenue within a year.
- Successfully launched three new investment products, contributing to a 15% growth in the company's product portfolio and attracting $75 million in investments within the first six months of launch.
- Implemented a strategic marketing campaign targeting high-net-worth clients, leading to an additional $100 million in assets under management and a 10% increase in overall client satisfaction ratings.

Associate External Wholesaler at Fidelity Investments, GA

Sep 2021 - Jan 2023

- Achieved 120% of annual sales target by effectively promoting Fidelity's investment products to financial advisors, resulting in over $60 million in new assets for the company.
- Successfully onboarded and developed relationships with 50+ new financial advisory firms, expanding Fidelity's market presence in Georgia and contributing to a 25% increase in regional sales.
- Implemented a strategic sales approach that increased client engagement and retention by 15%, leading to a higher volume of repeat business and solidifying Fidelity's position as a trusted partner for financial advisors in the region.

CERTIFICATES

Certified Investment Management Analyst (CIMA)

Feb 2022

Certified Retirement Counselor (CRC)

Aug 2020

MEMBERSHIPS

Financial Planning Association (FPA)

National Association of Insurance and Financial Advisors (NAIFA)