Keileigh Debock

Finance Advisor

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Profile

Results-driven Finance Advisor with 1 year of experience in providing strategic financial guidance to clients, specializing in investment management, retirement planning, and risk mitigation. Proven ability to assess clients' financial needs and develop customized solutions to help achieve their short and long-term goals. Adept at building strong relationships and efficiently managing clients' portfolios to maximize returns while minimizing risk. Committed to staying abreast of industry trends and continuously enhancing financial expertise to deliver exceptional service and drive client satisfaction.

Employment History

Senior Finance Advisor at Edward Jones Investments, VT

Feb 2023 - Present

- Successfully managed a portfolio of over $50 million for high net worth clients, resulting in an average annual return of 8% over five years.
- Implemented a financial planning strategy that increased client retention by 20% and attracted over 150 new clients within two years.
- Streamlined internal processes, reducing operational costs by 15% and increasing overall efficiency in the department.
- Collaborated with cross-functional teams to develop and launch a new investment product, generating over $10 million in assets under management within the first year of inception.

Finance Advisor at Ameriprise Financial, VT

Sep 2022 - Jan 2023

- Successfully managed a portfolio of over $50 million in assets, leading to an average annual return of 12% for clients over a three-year period.
- Implemented innovative financial planning strategies that increased client satisfaction rate by 20%, resulting in the acquisition of 30 new high-net-worth clients within one year.
- Streamlined internal processes and improved team efficiency by 15%, leading to reduced operational costs and increased profitability for the Ameriprise Financial branch in Vermont.

Education

Bachelor of Science in Finance at University of Vermont, Burlington, VT

Aug 2017 - May 2022

Relevant Coursework: Corporate Finance, Financial Management, Investments, Financial Accounting, Managerial Accounting, Risk Management, Financial Analysis, Microeconomics, Macroeconomics, Financial Modeling, Portfolio Management, International Finance, and Business Statistics.

Links

linkedin.com/in/keileighdebock

Skills

- Risk assessment
- Portfolio management
- Tax planning
- Retirement strategies
- Estate planning
- Investment analysis
- Budgeting

Languages

- English
- Arabic

Certificates

Certified Financial Planner (CFP)

Sep 2021

Chartered Financial Analyst (CFA)

Dec 2019

Memberships

Certified Financial Planner Board of Standards (CFP Board)