Nadean Wasche

Financial Advisor

Financial Advisor with 1 year of experience in providing sound financial guidance to clients, including investment planning, retirement planning, and risk management. Highly skilled in analyzing clients' financial situations, creating tailored strategies, and monitoring market trends. Strong communicator adept at building long-lasting relationships and helping clients achieve their financial goals. Committed to ongoing professional development and staying current with industry best practices.

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123 Maple Street, Indianapolis, IN 46204

Education

Bachelor of Science in Finance at Indiana University Kelley School of Business, Bloomington, IN

Sep 2018 - May 2022

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Investment Analysis, Financial Markets, Risk Management, Financial Modeling, and International Finance.

Links

linkedin.com/in/nadeanwasche

Skills

- Portfolio Management
- Risk Assessment
- Tax Planning
- Retirement Strategies
- Estate Planning
- Investment Analysis
- Wealth Preservation

Employment History

Financial Advisor at Edward Jones Investments, IN

Apr 2023 - Present

- Successfully managed a $50 million investment portfolio for over 100 clients, consistently achieving an average annual return of 8% for five consecutive years.
- Expanded client base by 25% within two years by implementing targeted marketing strategies, organizing local financial seminars, and leveraging existing client referrals.
- Reduced client attrition rate by 15% through the development and implementation of a comprehensive client communication plan, which included personalized financial reviews and quarterly performance updates.

Associate Financial Advisor at Charles Schwab, IN

Jul 2022 - Feb 2023

- Increased client portfolio value by 20% within the first year, resulting in over $5 million in additional assets under management for Charles Schwab.
- Implemented a new financial planning strategy that improved investment efficiency and reduced risk for clients, leading to a 15% increase in overall client satisfaction ratings.
- Successfully acquired 30 new high-net-worth clients within the first 12 months, adding an additional $25 million in assets under management for the firm.
- Streamlined internal processes and communication within the team, reducing the average time spent on client report preparation by 25%, allowing for more time to focus on client relationship building and business development.

Certificates

Certified Financial Planner (CFP)

Dec 2021

Chartered Financial Consultant (ChFC)

Mar 2020

Memberships