Tifney Brent

Financial Advisor Trainee

tifney.brent@gmail.com
(194) 873-0634
123 Oak Street, Cherry Hill, NJ 08034

Education

Bachelor of Science in Finance at Rutgers University, New Brunswick, NJ

Sep 2018 - May 2022

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

Links

linkedin.com/in/tifneybrent

Skills

- QuickBooks
- Excel
- Risk Assessment
- Portfolio Management
- Tax Planning
- Cash Flow Analysis
- Retirement Strategies

Languages

- English
- Spanish

Profile

Dedicated Financial Advisor Trainee with 1 year of experience in providing comprehensive financial planning services to clients. Adept at analyzing clients' financial situations, developing strategic recommendations, and cultivating strong relationships to ensure financial success. Strong analytical, communication, and interpersonal skills, with a commitment to continuous professional growth in the financial services industry.

Employment History

Financial Advisor Trainee at Edward Jones, NJ

May 2023 - Present

- Successfully acquired 50 new clients within the first year, resulting in a 30% increase in assets under management for the branch and generating over $1.5 million in additional revenue.
- Implemented a strategic marketing campaign targeting local small businesses, which led to the establishment of five new corporate retirement plans, increasing the branch's overall plan assets by 20%.
- Streamlined the client onboarding process, reducing the average time to onboard new clients by 25% and improving overall client satisfaction rates by 15%.

Associate Financial Advisor at Merrill Lynch, NJ

Jul 2022 - Mar 2023

- Successfully managed a diverse portfolio of over $50 million, consistently achieving an annual return on investment (ROI) of 8% for clients.
- Developed and implemented comprehensive financial plans for over 100 clients, resulting in a 30% increase in assets under management within two years.
- Identified and onboarded 25 new high-net-worth clients, contributing to a 20% growth in the client base and an additional $10 million in assets under management.
- Streamlined the financial planning process for the team, reducing preparation time by 25% and increasing overall efficiency and client satisfaction.

Certificates

Certified Financial Planner (CFP)

Mar 2022

Chartered Financial Consultant (ChFC)

Jun 2020

Memberships

Financial Planning Association (FPA)