

Susann Virgadamo

Financial Consultant

Profile

Details

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(371) 368-7177

123 Maple St, Wichita, KS 67202

Financial Consultant with 1 year of experience in providing clients with tailored financial solutions and investment strategies. Skilled in financial analysis, risk management, and portfolio optimization. Demonstrated ability to establish strong client relationships, enhance customer satisfaction, and meet financial targets. Adept at working in fast-paced environments and collaborating with cross-functional teams. Highly motivated, detail-oriented, and committed to continuous professional development.

Employment History

Senior Financial Consultant at Edward Jones, KS

Mar 2023 - Present

- Successfully managed a portfolio of over \$200 million in assets under management, resulting in a 15% increase in annual revenue for the firm.
- Streamlined financial planning processes for over 100 high-net-worth clients, leading to a 30% reduction in time spent on financial plan creation and a 20% increase in client satisfaction ratings.
- Led a team of junior financial consultants to achieve a 25% growth in new client acquisition within one year, bringing in an additional \$50 million in assets under management.
- Developed and implemented a comprehensive investment strategy for a major institutional client, resulting in a 10% increase in portfolio performance and a 5% reduction in risk exposure.

Financial Consultant at Ameriprise Financial, KS

Jul 2022 - Jan 2023

- Increased client portfolio returns by 15% within the first year through strategic asset allocation and investment management, leading to a total portfolio growth of \$10 million for Ameriprise Financial in Kansas.
 - Developed and implemented a comprehensive financial planning strategy for over 50 high-net-worth clients, resulting in an increase of \$5 million in new assets under management and a 20% increase in overall client satisfaction ratings.
 - Streamlined internal processes and improved team collaboration within the Kansas branch, which led to a 25% reduction in operational costs and a 30% increase in overall efficiency, contributing to a record-breaking annual revenue growth of 18%.
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Education

Bachelor of Science in Finance at Kansas State University, Manhattan, KS

Aug 2018 - May 2022