

# Sariya Fujiwara

Financial Counselor

## Profile

Financial Counselor with 1 year of experience providing clients with tailored financial advice and guidance. Proficient in preparing financial plans, analyzing clients' financial situations, and recommending suitable investment solutions. Demonstrates strong client relationship management skills and a commitment to helping clients achieve their financial goals. Adept at simplifying complex financial concepts and possesses a strong foundation in financial principles and regulations.

## Employment History

### Financial Counselor at BrightPath Mortgage Solutions, GA

May 2023 - Present

- Successfully increased client retention rate by 25% within the first year by implementing personalized financial plans and providing exceptional customer support, resulting in higher satisfaction levels among clients at BrightPath Mortgage Solutions, GA.
- Streamlined the loan application process, reducing the average processing time by 30% and increasing the number of approved loans by 20% within a six-month period, thereby contributing to the company's overall growth and profitability.
- Identified and corrected inefficiencies in the financial counseling process, leading to a 15% reduction in operational costs and a 10% increase in overall productivity, enabling the company to reallocate resources to more critical areas.

### Associate Financial Counselor at Ronald Blue Trust, GA

Jul 2022 - Mar 2023

- Successfully managed a portfolio of over \$50 million for high net worth clients, achieving an average annual return of 8% and consistently outperforming industry benchmarks.
- Implemented financial planning strategies for over 100 clients, resulting in an average increased savings of 15% and improved overall financial stability.
- Conducted in-depth financial analyses for clients' investment portfolios, leading to the identification and elimination of underperforming assets and an average increase in portfolio performance by 10%.
- Developed and presented comprehensive financial education workshops for over 200 attendees, leading to a 25% increase in new client acquisition and a 20% increase in client retention rates.

## Education

### Bachelor of Science in Finance at Georgia State University, Atlanta, GA

Sep 2018 - May 2022

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Investment Analysis, Financial Markets & Institutions,

## Details

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## Links

[linkedin.com/in/sariyafujiwara](https://www.linkedin.com/in/sariyafujiwara)

## Skills

Budgeting

Debt management

Investment strategies

Tax planning

Retirement planning

Risk assessment

QuickBooks proficiency

## Languages

English

Arabic

## Hobbies

Investing in stocks and bonds

Budgeting and personal finance management

Reading financial news and books