Sergio Cirone

Financial Services Manager

Details

sergio.cirone@gmail.com
(170) 721-7587
1234 Austin Lane, Dallas, TX 75201

Profile

Results-driven Financial Services Manager with 5 years of experience, skilled in financial analysis, budgeting, and strategic planning. Proven ability to optimize resources and streamline operations, while maintaining compliance with industry regulations. Strong leadership and team building capabilities, with a track record of driving revenue growth and enhancing client satisfaction.

Employment History

Financial Services Manager at Edward Jones, TX

May 2023 - Present

- Increased overall branch revenue by 20% in 2019, achieving a total of $3 million in revenue through effective client acquisition and retention strategies, as well as expanding the range of financial products and services offered.
- Successfully managed a portfolio of over 500 clients with total assets under management of $150 million, consistently exceeding quarterly performance targets and maintaining a 95% client retention rate.
- Streamlined internal processes and implemented new financial planning software, resulting in a 15% reduction in administrative tasks, improved efficiency, and enhanced client experience.
- Led a team of 8 financial advisors to achieve a 30% increase in new client acquisition in 2020, through targeted marketing campaigns, community outreach, and personalized financial solutions tailored to the needs of the local market.

Assistant Financial Services Manager at Charles Schwab, TX

Aug 2018 - Apr 2023

- Successfully increased client retention rate by 15% within the first year by implementing targeted financial strategies and building strong relationships with high net-worth clients.
- Streamlined internal processes and reduced operational costs by 10% through the introduction of automated systems and data-driven decision-making tools, leading to increased efficiency and productivity.
- Exceeded annual sales targets by 20%, generating over $5 million in new revenue for the company by identifying and pursuing new business opportunities and effectively cross-selling financial products and services to existing clients.

Education

Bachelor of Business Administration in Finance at The University of Houston, TX

Sep 2013 - May 2018

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Investments, Financial Markets, Financial Statement