

Montoya Kultgen

Financial Services Representative

Dedicated Financial Services Representative with 1 year of experience in providing exceptional client support and financial guidance. Adept at building strong relationships, identifying client needs, and offering customized financial solutions. Skilled in sales, financial planning, and maintaining regulatory compliance. Demonstrated ability to excel in a fast-paced, target-driven environment while prioritizing customer satisfaction.

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(420) 319-3749 
123 Maple Street, St. Louis, MO 
63101

Education

**Bachelor of Business
Administration in Finance
at University of Missouri,
Columbia, MO**
Sep 2018 - May 2022
Relevant Coursework: Financial
Accounting, Managerial
Economics, Financial
Management, Investment
Analysis, Corporate Finance,
Portfolio Management,
International Finance, Risk
Management, Financial
Markets, and Banking
Operations.

Links

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

Skills



Employment History

Financial Services Representative at Edward Jones, MO

Apr 2023 - Present

- Successfully increased the client base by 35% within the first year through targeted outreach and relationship-building strategies, resulting in an additional \$5 million in assets under management.
- Exceeded annual sales target by 50% in 2019, generating over \$2.5 million in revenue for Edward Jones through effective cross-selling of financial products and services to existing clients.
- Streamlined internal processes and improved team efficiency by 25% through the implementation of a new CRM system and consistent staff training, leading to a higher level of client satisfaction and retention.
- Developed and executed a comprehensive financial education program for local community members, which led to a 20% increase in new clients from referrals and strengthened the company's reputation as a trusted financial partner.

Associate Financial Services Representative at Stifel Nicolaus, MO

Aug 2022 - Feb 2023

- Successfully managed a portfolio of over \$50 million in assets, resulting in a 15% increase in overall client satisfaction and retention rates during my tenure.
- Streamlined the client onboarding process, reducing the average time taken by 30%, leading to a 20% increase in new client acquisition for the Stifel Nicolaus Missouri branch.
- Implemented new risk management strategies that reduced portfolio volatility by 10%, contributing to a 5% increase in annual returns for our clients.

Certificates

Certified Financial Services Representative (CFSR)

Aug 2021

Chartered Financial Consultant (ChFC)

Apr 2020

Memberships