DEVORA CAMILO

Investment Consultant

devora.camilo@gmail.com
(160) 766-0724
123 Main St, Hartford, CT 06103

PROFILE

Investment Consultant with 2 years of experience in providing strategic financial guidance to clients and optimizing investment portfolios. Proficient in analyzing market trends, identifying growth opportunities, and developing tailored solutions to meet individual client objectives. Demonstrated ability to foster strong client relationships, communicate complex financial concepts effectively, and consistently deliver results. Committed to staying current with industry advancements and maintaining the highest standards of integrity and professionalism.

LINKS

linkedin.com/in/devoracamilo

SKILLS

- Portfolio Management
- Risk Assessment
- Financial Analysis
- Asset Allocation
- Market Research
- Tax Planning
- Performance Monitoring

LANGUAGES

- English
- Urdu

EMPLOYMENT HISTORY

Investment Consultant at Fiduciary Investment Advisors, CT

Feb 2023 - Present

- Managed a diverse portfolio of over $5 billion in assets, consistently outperforming industry benchmarks by at least 3% annually.
- Successfully onboarded and retained 15 new institutional clients within one year, resulting in a 20% increase in assets under management for the firm.
- Led a team of analysts in conducting comprehensive due diligence on over 50 investment managers, resulting in the selection of 10 high-performing managers that contributed to an overall improvement in client portfolio performance by 6%.

Associate Investment Consultant at , CT

Aug 2021 - Jan 2023

- Successfully managed a $50 million portfolio, consistently achieving an annual return of 8% over a three-year period, notably outperforming the industry benchmark by 2%.
- Spearheaded a comprehensive investment strategy for a major client, resulting in a 25% increase in assets under management within 12 months and a 15% increase in annual fee revenue.
- Identified and implemented efficiency improvements in the investment analysis process, reducing the time spent on generating investment reports by 30% while maintaining high quality standards.
- Key contributor to a team that secured a high-profile institutional client with $100 million in assets, leading to a 10% increase in overall firm revenue and significantly enhancing the firm's reputation in the market.

EDUCATION

Bachelor of Science in Finance and Investment Management at University of Connecticut, Storrs, CT

Sep 2016 - May 2021

Relevant Coursework: Financial Accounting, Corporate Finance, Portfolio Management, Financial Markets, Risk Management, Financial Analysis, Investment Theory, and Economics.

CERTIFICATES

Chartered Financial Analyst (CFA)

Aug 2021

Certified Investment Management Analyst (CIMA)

Nov 2019