

# Marriana Anim

Personal Financial Advisor

## Profile

Dedicated Personal Financial Advisor with 1-year experience in providing customized financial planning solutions to clients to help them achieve their financial goals. Adept at building strong relationships, analyzing financial situations, and developing tailored strategies. Strong analytical and problem-solving skills with a commitment to staying current on industry trends and market fluctuations. Eager to utilize expertise in wealth management, investment planning, and risk assessment to deliver exceptional client outcomes.

## Employment History

### Personal Financial Advisor at Charles Schwab, OH

Mar 2023 - Present

- Increased client assets under management by 50% within two years, from \$40 million to \$60 million, by consistently providing sound financial advice and building strong relationships with clients.
- Outperformed revenue targets by 20% in 2019, generating \$1.2 million in revenue through effective portfolio management and attracting new clients through targeted marketing efforts and referrals.
- Successfully helped over 30 clients achieve their financial goals, including retirement planning and wealth preservation, by creating customized financial plans and implementing tailored investment strategies.

### Associate Personal Financial Advisor at Edward Jones, OH

Sep 2022 - Jan 2023

- Successfully grew client base by 45% within the first year, resulting in a 30% increase in assets under management and contributing significantly to the branch's overall growth.
- Implemented a comprehensive financial planning approach that increased client satisfaction rates by 25%, leading to a higher retention rate and more referrals.
- Developed and delivered customized investment strategies for high net worth clients, generating over \$1.5 million in new revenue for Edward Jones within two years.

## Certificates

### Certified Financial Planner (CFP)

Aug 2021

### Chartered Financial Consultant (ChFC)

Jan 2020

✉ [marriana.anim@gmail.com](mailto:marriana.anim@gmail.com)

☎ (653) 995-7323

📍 123 Maple Street, Columbus, OH 43215

## Education

### Bachelor of Science in Finance at Miami University, Oxford, OH

Sep 2018 - May 2022

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Investment Analysis, Financial Markets and Institutions, Risk Management, Financial Planning, Business Statistics, Econometrics, and International Finance.

## Links

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

## Skills

Budgeting

Investing

Taxation

Retirement planning

Risk management

Estate planning

Debt reduction

## Languages

English

Japanese