

Idania
Warszawski
Registered
Representative

Profile

Employment History

Details

idan.warszawski@gmail.com

(113) 567-2891

123 Maple St, Des Moines, IA 50315

Registered Representative with 1 year of experience in the financial services industry, adept at providing exceptional client support and developing investment strategies. Proficient in analyzing financial data, building strong client relationships, and ensuring regulatory compliance. Demonstrated ability to contribute effectively in a fast-paced, team-oriented environment. Highly motivated to expand knowledge and skills for continued professional growth.

Registered Representative at Edward Jones, IA

Apr 2023 - Present

- Successfully managed a \$50 million investment portfolio, achieving an average annual return of 12% for clients over a three-year period, significantly outperforming the market benchmark.
- Acquired and retained over 200 high net-worth clients within two years, resulting in a 30% increase in assets under management (AUM) and a 25% growth in annual revenue for the firm.
- Implemented a customized financial planning strategy for clients, leading to a 95% client satisfaction rate and a 90% client retention rate, substantially exceeding the industry average.

Associate Registered Representative at Wells Fargo Advisors, IA

Sep 2022 - Feb 2023

- Successfully managed a portfolio of over \$50 million in assets, resulting in a 12% increase in overall client wealth within two years.
- Exceeded annual sales targets by 25%, generating \$1.5 million in new investments and contributing to the growth of Wells Fargo Advisors' market share in the region.
- Streamlined internal processes by implementing a new client onboarding system, reducing paperwork and administrative tasks by 30%, allowing more time for building client relationships and providing personalized financial advice.
- Developed and maintained a client retention rate of 95% through proactive communication, timely responses, and a strong commitment to understanding and addressing individual client needs and goals.

Education

Series 7 License in Securities and Investments at University of Iowa, Iowa City, IA

Sep 2017 - May 2022

Relevant Coursework: Securities and Investments, Financial Markets, Portfolio Management, Equity and Debt Securities, Options and