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XX Xxxxx Xxxxxxx, Xxxxxx, XXXX XXX · XXXXX XXXXXX · xxxxxxxxxxx@xxxxx.xx.xx

FINANCIAL SERVICES PROFESSIONAL

CLIENT SERVICES•PROJECT MANAGEMENT•MARKETING

Client services professional with 12 years of international experience gained with wealth management firms in Switzerland, the UK and US. Articulate, polished and confident in her abilities, this effective communicator delivers outstanding service to high net worth individuals. Proven track record of supporting front line relationship managers, developing solutions for process improvement and delivering successful projects. Subject matter expert in compliance relating to account creation and investment activity, with additional experience in marketing and business development.

REPRESENTATIVE ACHIEVEMENTS

- Contributed significantly to the growth of The Capital Partnership (UK boutique investment firm), increasing assets under management from £300 Million to £1 Billion by assuming responsibility for marketing efforts and improving overall client experience.
- Implemented a critical investment monitoring system for Goldman Sachs Asset Management group, increasing the scope and efficiency of monitoring capabilities, substantially reducing potential for human error.
- Developed business-level French competency during a 16 month placement with Swiss-based private bank (Banco Del Gottardo).

PROFESSIONAL EXPERIENCE

MEDEX USA, Inc., Houston, Texas
January 2007 – December 2008
Facilitated the launch of a medical supplies distribution company in the US through market research, assessing product placement and creation of a Web presence.

THE CAPITAL PARTNERSHIP, London
A boutique wealth advisory firm specialising in alternative assets, family office services, trust and estate planning. Helped to grow the business from 6 employees with £300 Million in assets under management to 16 employees with £1 Billion in assets under management.
SENIOR ASSOCIATE – Business Development, Marketing and Investor Relations
November 2003 – June 2006
In addition to servicing client accounts and supporting the firm's founders, assumed responsibility for marketing and client reporting.

- Streamlined the process for establishing new accounts and developed a client database (Microsoft Access and Excel) to increase organisational efficiency and facilitate improved client communication.
- Identified a need for and developed effective marketing collateral to be used at client and prospect meetings. Materials included a company presentation, client presentations, fund fact sheets and performance updates.
- Led project to create an Internet presence. Coordinated efforts internally and managed vendors to launch the company's first website.

ASSOCIATE – Research Group
December 2001 – November 2003
As a member of the research team, responsibilities included quantitative and qualitative research of Hedge Funds/managers in addition to administering client's private equity investment accounts.

- Contributed to asset allocation decisions at investment strategy meetings.
- Streamlined the process for client portfolio reporting by standardizing reporting formats and introducing a data management system.

GOLDMAN SACHS ASSET MANAGEMENT, London, UK
This strategic division of the prestigious investment bank and securities firm is a leading investment manager, with 14 independent investment teams representing 80 strategies across asset classes, geographies and risk profiles.
ASSOCIATE, Compliance Group
June 1996 – July 2001
Key member of team, ensuring division compliance with regulatory bodies. This involved monitoring investment trading activity, conducting new client due-diligence with anti-money laundering checks, ensuring that accounts were managed according to guidelines, and approving marketing collateral.

- Selected to manage implementation of a critical investment monitoring system across the London, New York, Singapore and Hong Kong offices. This required cross-departmental coordination, effective management of resources, testing, training and included a 3 month secondment to the New York office.

BANCO DEL GOTTARDO, Geneva, Switzerland
Private bank and wealth management firm catering to high net worth individuals.
ANALYST, Private Banking Group
August 1994 – December 1995
This training program provided an excellent introduction to private banking and investment management with varied responsibilities between departments.

- Supported front-line relationship managers.
- Administered investment portfolios for international client base.
- Completed additional training programs covering foreign exchange, capital markets and trust/tax planning.
- Developed spoken French language from basic knowledge to business-level fluency through on-the-job training and evening classes.

ASCOT PROPERTIES, London
Property group specialising in residential and commercial sales and lettings.
RESIDENTIAL LETTINGS AGENT
September 1993 – July 1994
Negotiated contracts, managed rental properties, coordinated property maintenance.

PROFESSIONAL QUALIFICATIONS AND SKILLS

2002 Securities Institute – Certificate in Securities
2002 Securities Institute – Regulatory Paper
1998 Investment Management Certificate

French: business-level spoken
Arabic: basic written and spoken

EDUCATION

BSc (Hons) Economics (1993)
University College London, England

3 A Levels – Maths (A), Economics (B), Politics (B)

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XX Xxxxxx Xxxxxxx, Xxxxxx, XXXX XXX · XXXXX XXXXXX · xxxxxxxxxxxx@xxxxx.xx.xx

Date

Company Name and address if available

Dear *XXXX,*

I was delighted to see your listing for *Client Services Specialist*, as based on your job description it's exactly what I'm looking for. Having gained 12 years of experience with high end financial institutions such as Goldman Sachs Asset Management, I'm a strong candidate for this role. My CV demonstrates suitability in the following areas:

- Delivering consistent, business-winning service to high net worth individuals.
- Supporting front-line relationship managers, including firm founders in the expansion of their business.
- Designing solutions to increase operational efficiencies and improve client experience.
- Developing significant expertise in compliance for account creation and trading.

Beyond this experience, I'm a performer. I've earned this reputation through my track record of delivering successful projects. Applying a determined and methodical approach to my work ensures that I consistently achieve results, attaining the highest standards.

Following repatriation from the US 15 months ago, I've focused on arranging medical care for my father, managing his personal and financial affairs. I've also overseen the renovation of family property. Having concluded this business, I'm excited to return to the workforce in a challenging role with an employer who will benefit from my experience and professional approach. Working for your firm particularly appeals because *provide 1 or 2 reasons.*

I'm excited to hear from you, to determine how I can contribute to the growth of your business.

Sincerely,