

Objective

Direct report to C-level Executive, Philanthropist, or Entrepreneur with responsibility for office management and special projects.

Profile

Clients services and project management professional with 12 years of experience gained with wealth management firms in Switzerland, the UK and US. Articulate, polished and confident in her abilities, this effective communicator has a proven track record of success spanning high-net-worth client services, marketing and project delivery.

“As my second in command, I knew that I could assign any project to Xxxx and that it would get done. I didn’t have to worry about it.” Xxxxx Xxx-Xxxxx, CEO and Founder, The Capital Partnership, London.

Representative Achievements and Highlights

- Contributed significantly to the growth of a 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 across the London, New York, Singapore and Hong Kong offices of a prestigious investment bank/securities firm. This required cross-departmental coordination, effective management of resources, testing, training, and included a three month secondment to the New York office.
- Established and maintained an Internet presence for a boutique asset management firm. Coordinated efforts internally and managed vendors to launch the company’s first website.
- Streamlined the process for establishing new accounts and client reporting at the same firm by creating a client database that increased organisational efficiency and facilitated client communication (MS Access and Excel).
- Developed effective marketing collateral for a wealth management group, including a company presentation, fund fact sheets and performance updates for use at client and prospect meetings.
- Developed spoken French language from basic knowledge to business-level fluency, successfully completing a 16 month training placement with a Swiss-based private bank and wealth management firm.
- Supported front line relationship managers and administered portfolios for international clients at the same financial services firm.
- Facilitated the launch of a medical supplies distribution company in the US (Medex), through market research, product placement and establishing a web presence.

Experience

Jan 2007 – Dec 2008 · **MEDEX USA, Inc.** · Houston, USA
Dec 2001 – Jun 2006 · **THE CAPITAL PARTNERSHIP** · London
SENIOR ASSOCIATE – Business Development, Marketing and Investor Relations · ASSOCIATE – Research Group
Jun 1996 – Jul 2001 · **GOLDMAN SACHS ASSET MANAGEMENT** · London · *ASSOCIATE, Compliance Group*
Aug 1994 – Dec 1995 · **BANCO DEL GOTTARDO** · Geneva, Switzerland · *ANALYST, Private Banking Group*
Sep 1993 – Jul 1994 · **ASCOT PROPERTIES** · London · *Residential lettings agent*

Skills and Professional Qualifications

- Business-level spoken French
- Basic written and spoken Arabic
- Securities Institute – Certificate in Securities (2002)
- Securities Institute – Regulatory paper (2002)
- Investment Management Certificate (1998)

Education

1993 BSc. (Hons) Economics, University College London
1989 3 A Levels – Maths (A), Economics (B), Politics (B)

XXXX Xx-XXXXXXXX

·XX XXXXX XXXXXXXX, XXXXXX, XXXX XXX

·XXXXX XXXXXXXX

·XXXXXXXXXXXX@XXXXX.XX.XX

Date

Company name and address

Dear XXX:

I was delighted to see your listing for XXXXX, as based on your job description it's exactly what I'm looking for. With 12 years of experience and significant career achievements under my belt, I'm a strong candidate for this position. Through my track-record of delivering successful projects I've earned a reputation for getting things done, becoming the 'go to' person for each of the firms at which I've worked. With my determined and methodical approach, I consistently achieve results and attain 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 transferable skill set. Your job listing particularly appeals because *(give one or two brief reasons)*.

So, if you're looking for a performer - someone who can anticipate needs, handle complex projects and support the expansion of your business – I'd love to talk with you and learn more about the position and your company.

I look forward to hearing from you.

Sincerely,