JOSEPH J. DOE

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FINANCIAL ADVISOR / CIVIC ENGAGEMENT / YOUTH DEVELOPMENT & LEADERSHIP

FINRA Series 7-Securities Broker/Dealer and Series 66 Investment Advisor Licenses

- **Financial expert** with proven record in developing successful strategies for clients and managing business relationships with high-net-worth customers.
- **Leverage** planning and analytical skills in asset management overseeing $3M in stocks, bonds and mutual funds. Strategic thinker and communicator able to drive sales that are aligned with client goals.
- **Utilized influence to help raise over $200K** for start-up positioning the company for high growth.
- **Expanded membership to 500** professional men of color within four (4) years as Chair of Membership Committee of Boys to Men.

AREAS OF EXPERTISE

- Financial Analysis & Planning
- Risk Assessment
- Account Management
- Financial Education
- Strategic Relationship Builder
- Business Development
- Marketing Analysis
- Fundraising, Youth Development and Mentorship

PROFESSIONAL EXPERIENCE

Milwaukee Financial Services, LLC, Milwaukee, WI 2008 - Present
Financial Advisor

- Analyze industries trends for high net worth clients and corporations managing assets of $5M. Develop and customize strategies that produce profitable outcomes.
- Conduct in-depth risk assessments and implement risk management strategies to advance client investment portfolios.
- Formulate valuable marketing plans specific to target market; successfully increased client base over last four years.
- Increased partnerships with more than 100 property and casualty insurance agencies by establishing referral initiative program. Lead presenter at company seminars on retirement, life insurance, college savings and employee benefits.

Assets Are Us Company, Detroit, MI 2004 - 2008
Personal Financial Advisor

- Provided holistic financial planning solutions to clients by gathering data through dynamic analyses.
- Applied influence and networking skills to identify and cultivate partnerships with prospects client.
- Listed "*Top Performer*" by senior management within one (1) year of joining the firm.

Money Makers, LLC, New York, NY Summer 2002
SEO Intern Analyst – Trading and Sales Division

- Selected as one of 200 students from nationwide applicant pool of 3,000 to participate in a 16-week Sponsors for Educational Opportunity (SEO) Program. Designed, authored and created newsletters for traders and colleagues.

PROFESSIONAL AFFILIATIONS

Boys to Men, Board Member and Chair, Boston, MA 2008 - Present
Executive Leaders, Inc., Executive Education Program, Boston, MA 2010

EDUCATION

University of University, Master's Business Management Program, Detroit, MI 2008
University College, B.A., Public Policy and Administration (GPA: 4.0), Detroit, MI 2001

DivineDesign