EMERY JUNKERSFELD

Financial Consultant

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PROFILE

I have over 5 years of experience as a Financial Consultant. In my role, I provide analysis and recommendations to clients in order to help them make informed financial decisions. I have extensive knowledge of investment products and strategies, and am able to tailor my advice to each client's individual needs. I pride myself on being able to build long-term relationships with my clients, based on trust and mutual respect.

LINKS

linkedin.com/in/emeryjunkersfeld

SKILLS

- Financial analysis
- Financial modeling
- Excel
- PowerPoint
- Word
- Customer service

LANGUAGES

- English
- Dutch

EMPLOYMENT HISTORY

Financial Consultant at Raymond James, OK

Jun 2022 - Present

- Negotiated and closed $5 million in new business deals.
- Led a team of 5 financial consultants to generate $10 million in annual revenue.
- Exceeded quarterly sales targets by 15%.
- Grew client base by 20% through effective networking and relationship building.
- Developed innovative marketing strategy that generated 500 new leads.

Senior Financial Consultant at Ameriprise, OK

Sep 2017 - Apr 2022

- Achieved $10 million in new client assets under management within first 12 months on the job.
- Grew existing clients' portfolios by an average of 20% per year.
- Negotiated and successfully implemented a new fee structure for larger clients that increased revenue by 15%.
- Led team of junior financial consultants in developing and presenting retirement planning seminars to local businesses, resulting in 5 new corporate accounts worth a total of $2.5 million in AUMs.
- Authored white paper on portfolio diversification strategies that was published by company website and shared with all clients.
- Presented at industry conference on behalf of firm, leading to 3 new high-net-worth individual clients.

EDUCATION

Bachelor of Science in Finance at The University of Oklahoma, Norman, OK

Aug 2013 - May 2017

I've learned how to read and analyze financial statements, how to value companies using different methods, how to manage portfolios, and how to trade financial instruments.

CERTIFICATES

Certified Financial Planner (CFP)

Oct 2020

Certified Public Accountant (CPA)

May 2019