


Kellianne Heed

Investment Advisor

kellianne.heed@gmail.com 

(625) 295-7453 

703 Westover Dr, 
Winston-Salem, NC 27104

Education

**Bachelor of Science
in Economics at Duke
University, NC**

Aug 2007 - May 2012

Some skills I've learned are economic analysis, research, data analysis, and writing.

Links

[linkedin.com/in/kellianneheed](https://www.linkedin.com/in/kellianneheed)

Skills

Financial analysis

Portfolio management

Risk tolerance assessment

Investment selection

Financial planning

Retirement planning

Asset allocation

Languages

English

French

Employment History

Investment Advisor at Ameriprise Financial Services, Inc., NC

Jun 2022 - Present

- Achieved \$10 million in assets under management for clients.
- Grew client base by 15% through effective networking and marketing.
- Negotiated favorable terms with investment managers on behalf of clients.
- Generated an average annual return of 12% for clients over a 3-year period.
- Actively managed client portfolios to protect against market volatility.

Investment Advisor Associate at Edward Jones - Financial Advisor: Mike Drees, AAMS®, NC

Aug 2020 - May 2022

- Achieved sales goals of \$2M in assets under management within first 6 months on the job.
- Exceeded new client acquisition goal by 20% in first year.
- Grew existing clients' portfolios by an average of 10% per year over 3-year period.
- Demonstrated expertise in financial planning and investment analysis to help clients reach their long-term financial goals.
- Earned consistently high marks for customer satisfaction, with a rating of 4.8 out of 5 over 2 years.

Investment Advisor Trainee at Wells Fargo Advisors, NC

Aug 2012 - Jul 2020

- Trained and developed 15 investment advisors, helping them increase their client base by an average of 25%.
- Grew personal book of business by \$1.2 million in first year through effective networking and leveraging internal resources.
- Won "Rookie of the Year" award for top new advisor at firm.
- Achieved 85% customer satisfaction rating in post-interaction surveys.
- Exceeded quarterly sales targets by an average of 17%.

Certificates

Certified Financial Planner (CFP)

May 2021

Chartered Financial Analyst (CFA)

Jan 2020