

Mariam Gettis

Wealth Manager

Details

mariam.gettis@gmail.com

(488) 079-8021

12345 Anywhere Street, Anywhere, FL 12345

Profile

I am a wealth manager with over 5 years of experience in the industry. I have worked with clients of all sizes and backgrounds, and have helped them to achieve their financial goals. I am knowledgeable in investment planning, portfolio management, and risk assessment. I am also experienced in providing tax-efficient solutions for my clients. I believe that my skills and experience would be a valuable asset to any organization.

Employment History

Wealth Manager at Merrill Lynch Wealth Management, FL

May 2022 - Present

- Achieved \$100 million in assets under management for high net worth clients.
- Grew a book of business by 20% through cross-selling and referrals.
- Exceeded annual targets for new client acquisition and AUM growth.
- Demonstrated expertise in investment planning, portfolio construction, and risk management.
- Provided comprehensive wealth management services including financial planning, investment advisory, tax advice, and estate planning.

Wealth Manager Associate at J.P. Morgan Securities Wealth Management, FL

Sep 2017 - Apr 2022

- Achieved \$3 million in new client assets within first year on the job.
- Exceeded quarterly sales goals by 20%.
- Grew existing clients' portfolios by an average of 7% per year.
- Demonstrated expert knowledge of investment products and strategies to potential clients, leading to a successful close rate of 85%.
- Won "Rising Star" award from company.

Education

Bachelor of Science in Economics at University of Florida

Aug 2013 - May 2017

Some skills I've learned are: critical thinking, problem solving, data analysis, and effective communication.

Links

linkedin.com/in/mariamgettis