Murphy Brownhead | Anytown, PV | murphybrownhead@mail.exe | LinkedIn | 999.123.4567

PROFILE | Top-performing sales professional with over $200M in financial products sales since 2011. Recipient of six provincial and national Top Sales awards as identified herein.

PROFESSIONAL BACKGROUND

Senior Financial Advisor | June 2010 to October 2021
Pinnacle Advisory Partners, Anytown, PV

- applied comprehensive industry knowledge to match clients with the right financial products, growing new business to $215M in 11 years
- identified an average 120 viable leads year-over-year, following up by closing 71% of leads; achieved across-the-board excellent client-satisfaction scores among 230 multiple-product households per annum since 2013
- developed a nation-wide referrals network integral to generating viable, often vetted, leads; innovated and engineered opportunities to launch relationship-building initiatives, resulting in a $7M account and growing it to $10M in one year

Senior Commercial Account Manager – Corporate Banking | April 2005 to February 2008
Acme Investment Services, Anytown, PV

- actively promoted an inclusive work environment by mentoring and coaching new Advisors; guided and supported 16 colleagues, collectively handling a portfolio valued at over $1B
- engaged on-the-fly problem-solving skills to analyze and act on complex financial situations; developed solutions through negotiation and collaboration in the interest of sustainability
- championed clear communication and understanding by engaging stakeholders, colleagues, and clients with empathy; followed up by collaborating on how best to achieve mutual goals
- advised large-market contribution and benefit-plan sponsors on investment solutions for client-retirement plans, generating peripheral sales up to 45%
- authored semi-annual commentary on the National Capital and Fixed Income markets for distribution among prospective clients, resulting in 40 new multiple-product clients annually

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CURRENT CERTIFICATION

National Securities Course, Administration & Practices Handbook, Professional Financial Planning
National Securities Institute

Personal Financial Planning, Branch & Regional Compliance Manager, Business Program for Bankers
Consortium of the Institute of National Bankers (CINB)

EDUCATION

Diploma, Business Administration | 2005
Major in Marketing
Business University, Bigcity, PV

Bachelor of Commerce Transfer Program | 2004
Bigcity University, Bigcity, PV

AWARDS

National Banker | 2020
Sales and Service Results | TFSG President's Club | 2017, 2019, and 2020
Top Sales in North District | RIS | 2005 and 2006

ASSOCIATIONS

Rotary Club Member | 2011 to Present
President 2016
Treasurer 2013 to 2015
Secretary 2011 to 2013

Advisory Council Member | Pinnacle Advisory Partners | 2017 to 2020
Chairman for Bigcity Citizen of the Year Committee | 2018

COMMUNITY VOLUNTEER ACTIVITIES

Coach, Youth Sports | 2002 to 2019
Coached kids in soccer and baseball across multiple communities throughout the province