

John Smith, CFA

1234 Elm Street • Anytown, ST • (123) 456-7890

QUALIFICATIONS

Fourteen years experience in portfolio management and analysis, all phases of sales and marketing, administrative and operational management involving investments, accounting and finance, and venture capital projects.

- Number one financial consultant in region gathering assets of \$150MM in two years
- As management consultant, helped grow annual assets from \$100MM to over \$1B

EMPLOYMENT

NAME OF CORPORATION, City, ST 07/99 to 03/04
Portfolio Manager / Investment Analyst

- Part of four-member team responsible for managing more than \$1B in Large Cap Core assets
- Managed \$300MM in balanced portfolios for more than 100 clients
- Lead equity analyst covering technology, basic materials and transportation sectors; lead economic analyst covering monetary policy
- Aided business development staff in the acquisition of new clients, both HNW and institutional
- Prepared quarterly reports on sectors and companies; wrote client newsletter articles
- Skilled presenter for executive briefings with ability to give top line information and also dive deeply into complex investment strategies as the situation requires
- Member of Executive Management Committee, Portfolio Construction Committee, Fixed Income Policy Committee, and Asset & Liability Management Committee

NAME OF LIFE INSURANCE COMPANY, City, ST 02/97 to 10/98
Portfolio Manager

- Team Leader to Financial Planning staff as they develop portfolio strategies, asset allocations and investment policy statements for senior management of existing and prospective corporate clients

NAME OF INSURANCE COMPANY, City, ST 01/93 to 01/97
Management & Technology Consultant

- Actively participated in the establishment of a new Strategic Business Unit to serve the exploding variable annuity marketplace. **Result:** Grew assets from \$100MM annually to over \$1B and new accounts from 20 a week to 200 a day
- Developed and analyzed departmental budgets and trained insurance staff for NASD exams
- Applied knowledge of systems and application design to assist technical development team in creation of effective software solutions

FINANCIAL SERVICES COMPANY, City, ST 01/91 to 01/93
Financial Consultant

- Number one consultant in region gathering assets of \$150MM in just two years
- Advised corporate clients on interest rates, foreign exchange, derivatives and cash management
- Created and delivered presentations on the "Characteristics and Risks of Short Term Money Market Instruments"

EDUCATION

B.S., **Economics** (Accounting Minor), University of Anytown, City, ST (1983)

LICENSES AND CERTIFICATIONS

Chartered Financial Analyst (1999)
NASD Series 7, 24, 63, & 65 (All Expired)

PROFESSIONAL AFFILIATIONS

Society of Financial Analysts
County Society of Investment Managers
NASD Board of Arbitration

SYSTEMS PROFICIENCY

VB & VBA application design, development & coding
Bloomberg & FactSet advance macro design & Microsoft Excel integration