Jeff L. Adams

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PROFILE

Experienced Financial Professional with expertise in wealth management seeks to transition career and build on academic experience with financial modeling and forecasting analysis as graduation fast approaches. **Common attributes used by references include:** team captain, analytical thinker, tenacious, and competitive.

EDUCATION

Harvard University, Extension School

- Major Degree in Economics, Minor in Finance, Distance Studies (started program 2012)
- Expected Graduation: Nov 2017

Montgomery College of Rockville

- Business Administration, Part-time studies (2008)

PROFESSIONAL EXPERIENCE

Connor, Clark and Lunn, Private Capital (Toronto, ON) July 2015 – Nov 2016
Associate (Private Capital)

- Prepared time sensitive pitch materials, led client onboarding activity, and administered investment reporting for clients, foundations and smaller institutional investors on behalf of Portfolio Managers.
- Subject matter expert on RESPs to be in-house recourse and increase effectiveness of associate team.
- Was the only associate to initiate prospecting efforts of referral relationships in new markets.
- Generated financial analyses known as the Asset Forecasting Analysis (AFA), as well as other content to aid portfolio managers in presenting solutions to clients or prospective clients.
- Acted as liaison between clients and back-office support to deliver a premier experience for investors.

Edward Jones (Toronto, ON) December 2014 – Mar 2015
Financial Advisor

- Completed market research and created a pipeline of prospective clients in a targeted market.

RBS Citizens Financial Group (Boston, MA) October 2012 – Aug 2014
AVP, Premier Relationship Manager II (Feb 2014 - Aug 2014)

- Grew and improved the revenue performance of an affluent client based portfolio covering 4 branches in Downtown Boston (referral generating team of 14).

Banker (Oct 2012 - Feb 2014)

- Consistently ranked as top 5 retail sales colleague in the Citizens Bank Boston region.
- Completed formal bank training: Demand Deposit, Saving, Lending, & Regulation.
- Closed sales by addressing personal and commercial consumer goals – consultative sales process.
- Originated and prescreened secured/ unsecured lending opportunities.
- Collaborated with team of 10 to meet needs/goals of Citizens Bank and its customers.

The Diamond Group Realty (Cambridge, MA) September 2012 - Aug 2014
Associate

- Gained knowledge of real estate decision-making as well as market and property analysis.
- Performed analyses of both location strategies and demographics.

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Prudential Financial (Orlando, FL) July 2011 - Mar 2012
CDP Agent

- Obtained multiple Florida state insurance licenses.
- Developed and managed the growth of a personal book of business for the following products: Life Insurance: Term Life, Variable Life Insurance; Retirement: Annuities, Variable annuities, Fixed annuities; and Investments: Mutual funds
- Built and maintained strong business relationships by having strong product and service knowledge.

State Farm Insurance (Rockville, MD) Sept 2010 – Mar 2011
Business Developer, Insurance Producer

- Developed business for start-up insurance branch and did market strategy planning.
- Executed a campaign establishing referral programs with 12 apartment communities to take advantage of a niche market.
- Performed analysis presentations to educate and gain new clients with multiple lines business: car, home, and liability insurance, and starter accounts for State Farm Bank.
- Developed excellent follow-up and appointment setting skills; had a 3:4 closing ratio.
- Was a Supervisor and Trainer to an insurance agent apprentice.

Experience prior to 2010 consisted of 2 years as Sales Associate for Sterling Jewelers; 2 years as Sales & Training Supervisor for Just Puppies; and 10 months as a Security Officer for Professional Security Consultants Inc.

SKILLS AND CERTIFICATIONS

Skills:

- Comfortable working with DCF & WACC valuation methods as well as building models for analysis
- Effective relationship builder and communicator to senior management, high net worth clients, foundational and institutional clients
- Demonstrated success in building a business book and comfortably navigating relationships with high net worth clientele through a consultative sale process and close
- Able to use software to construct models for financial analysis of clients' financial goals and present solutions to clients
- Comfortable discussing and educating others on a range of investments including, but not limited to: pooled funds, alternative investments, hedge funds, and derivatives
- Have basic proficiency in Mandarin (Chinese)

Programs and Certifications:

- Designation: Chartered Investment Manager (CIM) designation holder
- Licensing programs completed for Canada: Canadian Securities Course (CSC), Conduct and Practices Handbook (CPH), Investment Management Techniques (IMT), Life License Qualification Program (LLQP), Portfolio Management Techniques (PMT)

VOLUNTEERING AND COMMUNITY INTERESTS

- Previous volunteer for KEEN (Bethesda, MD) – an organization that specializes in encouraging children with physical and mental disabilities to participate in sports activities and team work
- Previous volunteer for the Downtown Sailing Center (in Baltimore, MD) – an organization that encourages adults and children with physical and mental disabilities to take part in sailing