Jeff L. Adams

https://www.linkedin.com/in/jefflaneadams
Phone: (647) 677-0207 https://app.plum.io/profile/jefflaneadams
Email: JLA586@g.Harvard.edu

PROFILE

Experienced Financial Professional with strong business development skills seeks to transition career from Private Wealth Management and build on academic foundation in investment research, project analysis, and financial modeling.
Common attributes used by references include: team captain, analytical thinker, tenacious, and competitive.

EDUCATION, CERTIFICATIONS, TRAINING

Harvard University, Extension School September 2012 – Nov 2017
- Major Degree in Economics, Minor in Finance, Distance Studies

The Marquee Group June 2017
- Building A Financial Model (of a Company)

Canadian Securities Institute December 2014 – Oct 2016
- Canadian Securities Course (CSC), Chartered Investment Manager (CIM - Professional Designation)

PROFESSIONAL EXPERIENCE

Connor, Clark and Lunn, Private Capital (Private Canadian Portfolio Management firm) Toronto, ON
Associate (Private Capital) July 2015 – Nov 2016
- Prepared time sensitive pitch materials, owned projects from end to end, and administered investment reporting for high new worth investors, foundations and institutional investors on behalf of Portfolio Managers.
- Used financial analyses to provide comparison content on investment mandates for client/prospect meetings.
- Was the information resource for team on RESP accounts and was the only associate to initiate prospecting efforts.

Edward Jones (North American Investment Advisement for retail and mass affluent investor) Toronto, ON
Financial Advisor December 2014 – Mar 2015
- Completed market research and created a pipeline of prospective clients in a targeted market.

RBS Citizens Financial Group (Leading regional retail bank for Northeastern United States) Boston, MA
AVP, Premier Relationship Manager II Feb 2014 - Aug 2014
- Improved revenue performance of a mass affluent based client portfolio with approx. $60 MM AUM.

Banker Oct 2012 - Feb 2014
- Consistently ranked top 3 of approx. 70 retail sales colleagues in the Citizens Bank Boston region.
- After completing formal bank training, used a consultative sales process to originate sales and credit opportunities.

The Diamond Group Realty (Commercial Real Estate Brokerage: Restaurant and Retail Properties) Cambridge, MA
Associate September 2012 - Aug 2014
- Performed market research and property analysis to gain experience in real estate decision-making and strategy.

Prudential Financial (Insurance focused financial advisory company) Orlando, FL
CDP Agent July 2011 - Mar 2012
- Developed and managed the growth of a personal book of business for various insurance and investment products.
- Conducted market and competitive analysis to measure the level of competition as well as interest in a given area.

State Farm Insurance (Insurance Provider for North America) Rockville, MD
Business Developer, Insurance Producer September 2010 – Mar 2011
- Developed business by executing a marketing and referral campaign with 12 apartment communities.
- Performed presentations to educate prospects and solicit multiple lines business: car, home, and liability insurance, and starter accounts for State Farm Bank. 3:4 closing ratio for in-person appointments.

Other Interests: Training in Mixed Martial Arts (MMA), running, cycling, traveling, languages (Mandarin and Spanish), exploring new food, and volunteering for organizations focused on helping children and/or the less fortunate.