İsim Soyisim

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İNVESTMENT BANKER

More ıhan 7 years of investment managemcnt experiencc with award-wlnning results.  
V/ell-developed relationshıp managzme.nl expertise thal complements account acauisiıion skills.  
Broad knowledge of numerous financial Instruments and complex invcstmenı scenarios.

— Areas of Key Evphasis —

* Portfolio Management • Privatc & Insıituiion Accounts • Ncgotiaıion & Closing
* Mutual & Hcdgc Funds • High-lmpact Prcscntations • Rcgulatory Compliance
* Client Rclations • Tcam loadcrship • Excccdmg Revcnue Coals

SlCNATURE ACHIEVEMENTS

Shattered performance expecıations. including adding $I2.7M in asseıs in one year.  
Attained national renown for outstanding performance on highly traded mutuol funds.  
Recognizcd among the top 200 advisors worldwidc.

PROFESSIONAL EXP£RIENCE

Investmcnt Officer 1 Tidman Trust. Chicago. Illinois 11/2010 - Preseni

Lcad team in investmcnt product sales; oversec relationshipbanking team with a tircless focus on increasing revcnue and maximizing profitability. Consult with clients to asscss financial situaıions and goals; devclop iargcied investment sıraıcgies.

Key Accomplishments:

* Consistcntly maintaincd 100% or bcttcr of establishcd production goals.
* Successfully attained 127% of 2011 ’s Sİ OM objcctive through outstanding relationshıp management.
* Earned multiplc national awards for outstanding acumen and aboveıhebar production vvith Kieheen Capital and Persephone mutual funds in 2013 and 2014.
* Received Alliance Capital Advisory Avvard for ranking among the lop 200 advisers vvorldvvide for new busincss dcvelopment.

İnvestment Associatc | Goldman Simmons, Portland, Oregon 7/2008 - 11 /2010

Assisted Outside Sales Representatives ıhroughout the investment sales process. Coordinated transactions with top brokerage houses.

Key Accomplishments:

* Supportcd continual revcnue grovvth by planning and executing client-focused sales events.
* Assisted sales team wiıh socuring and growing majör Institutional account that added millions of dollars to total asseıs under management.

Education and Credentials

Sachclor of Business Administration (MBA) - 2008 I Oregon State University, Portland. Oregon

Profcssional Liccnscs: FINRA Scries 7. 6. 63. & 65  
Training & Dcvelopment: Dale Carnegie Sales Training | leadership & Team Building