

Allison Rosenberg

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Profile

- Banker with strong experience assessing risk and managing portfolios. Use consultative sales methods to build positive long-term relationships with clients. Credentials include Chartered Financial Analyst (CFA) and Certified Financial Planner (CFP).

Education

- Master of Business Administration | CONCENTRATION IN FINANCE, HARVARD BUSINESS SCHOOL, Boston, MA
- Bachelor of Science in Finance | UNIVERSITY OF PENNSYLVANIA - THE WHARTON SCHOOL, Philadelphia, PA

Professional Development

- Chartered Financial Analyst (CFA), CFA Institute
- Certified Financial Planner (CFP), Certified Financial Planner Board of Standards
- Financial Risk Manager (FRM), Global Association of Risk Professionals

Key Skills

- Business development
- Consultative sales
- Customer service
- Financial analysis
- Investment strategy
- Portfolio management
- Risk assessment and management
- Strategic planning

Professional Experience

SENIOR BANKER | XYZ FINANCIAL SERVICES, PHILADELPHIA, PA | JUNE 2018 TO PRESENT

- Manage a diverse portfolio of high-net-worth clients, consistently exceeding financial targets by over 15%
- Conduct detailed risk assessments for various financial decisions, reducing potential losses by 20%
- Foster and maintain strong client relationships, increasing retention by 30%

ASSOCIATE BANKER | LMN BANK, BOSTON, MA | MAY 2015 TO JUNE 2018

- Directed a portfolio of clients, providing financial advice and making investment decisions that increased portfolio value by 25%
- Assessed financial risks associated with each client account, reducing potential losses by 18%
- Built strong client relationships, increasing client satisfaction by 20%