

Thomas Reed

ABOUT ME

Private loan officer serving high-net-worth clients

Experienced private loan officer with eight years specializing in personalized financial solutions for affluent individuals.

PROFESSIONAL EXPERIENCE

Private Loan Officer

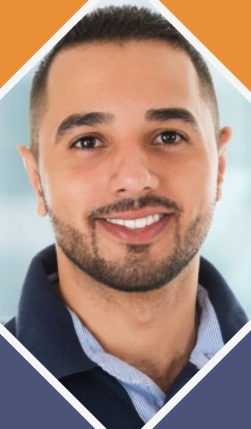
Citi Private Bank, Beverly Hills, CA | May 2016 - Present

- Structured \$80 million annually in private loans for high-net-worth clients
- Designed custom repayment plans, increasing client retention by 25%

Relationship Manager

Morgan Stanley, Los Angeles, CA | October 2013 - May 2016

- Managed portfolios for over 50 clients, ensuring tailored financial solutions
- Advised clients on leveraging private loans to expand investment opportunities



CONTACT INFORMATION



(123) 456-7890



email@example.com



LinkedIn



Beverly Hills, CA

EDUCATION

MBA

UCLA Anderson School of Management

KEY SKILLS

- Private lending
- Wealth management
- Custom loan products