



Allison Rosenberg

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).

CONTACT

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KEY SKILLS

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

PROFESSIONAL EXPERIENCE

June 2018 - Present

Senior Banker | XYZ Financial Services | Philadelphia, PA

- 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%

May 2015 - June 2018

Associate Banker | LMN Bank | Boston, MA

- 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%

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, February 2014
- Certified Financial Planner (CFP), Certified Financial Planner Board of Standards
- Financial Risk Manager (FRM), Global Association of Risk Professionals