# A. Cashman

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## *Certified Financial Planner*

Driven financial planning professional with track-record of success at developing comprehensive financial strategies for diverse clientele. Combines financial and sales expertise to win new and maintain existing accounts to drive firm growth. Expert communicator, adept at building rapport with clients to deliver tailored financial plans and strategies that align with overall goals.

## Skills

- Financial Planning
- Financial Analysis
- Investment Strategy
- Asset Management
- Client Retention
- Risk Management
- Cash Flow Analysis
- Strategic Planning
- Client Relations
- Account Management
- Compensation Planning

## Experience

### Financial Services Firm, LLC – New York, NY — 2014 - present

*Financial Planner*

Develop comprehensive financial plans and strategies for clients to meet varying needs and life stages. Build new and maintain existing client relationships to grow practice and ensure continued repeat business. Conduct regular reviews with clients to evaluate plan efficacy, and provide recommendations for areas to adjust or expand. Assess assets to identify potential liabilities and remediate risk to ensure overall financial preparedness for clients.

- Managed $32M in assets for a clientbase of 200+.
- Grew book of business by 33% by creating and implementing a new client-referral program.
- Increased client satisfaction by 15% in one year, consistently placing at the top of firm-wide rankings.

### Boutique Finance Firm – New York, NY — 2011 - 2014

*Associate Financial Planner*

Support financial planners across all business activities, from financial plan development and maintenance to client communications. Helped match clients with available financial services and develop comprehensive plans to meet their needs. Assisted in the preparation of income tax returns, and provided support to financial planners throughout the areas of cash flow, compensation planning, risk management and overall investment strategy.

- Identified new opportunities by analyzing client data to uncover untapped service areas.
- Managed workflow to meet all deadlines, prioritizing assignments to deliver accurate and on-time reports.
- Ensured client satisfaction by providing assistance and resolving issues on a day-to-day basis as primary point of contact.

## Education

### New York University – New York, NY

*BS, Finance*

## Certifications

- Certified Financial Planner (CFP) — Certified Financial Planner Board of Standards