

Anthony Roberts

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Personal profile

A highly motivated recent Business Studies graduate looking to kick start his career as a financial advisor and build his business building skills with a reputable finance company.

Possessing enthusiasm, drive and a positive attitude required to be successful in a sales and marketing environment. Presently looking for a graduate or trainee financial advisor position with a rewarding and forward looking company.

Academic qualifications

BA (Hons) Business Studies 2:1

Certificate in Financial Planning (CFP)

A' Levels:
Maths (B)
English(A)
Geography (C)

Work experience

MORTGAGE ADVISOR (part – time)

First Base Mortgages June 2010 - Present

Giving advice on mortgages and related products like investments, life insurance, critical illness cover and pensions. Working in the early evening, contacting clients via telephone and occasionally meeting them face to face.

Duties:

Helping clients to find financial products that suit their needs.

Doing general administrative office work.

Having to explain financial matters clearly, with the minimum of jargon.

Conducting in-depth reviews of clients' financial circumstances.

Researching and finding the best financial products.

Contacting other professionals like estate agents, solicitors and valuers.

Making sure all paperwork is completed correctly to comply with the regulations of the Financial Services Authority (FSA).

Setting up meetings with clients.

Voluntary experience

Volunteer Advisor (part - time)

Citizens Advice Bureau January 2010 – June 2010

Spending Saturdays by providing people with free legal advice to help resolve any problems or issues they have.

Duties:

Making telephone calls and enquiries on behalf of clients.

Occasionally going along with them to court hearings or at tribunals.

Writing letters on behalf of people.

Explaining to people how we can help them.

Administrative duties like filing, updating records.

Finding out about a clients problems.

Answering emails and phone enquiries.

Getting involved in media campaigns.

Helping with fundraising activities.

Personal skills

- Success and results driven.
- Excellent numeracy and IT skills.
- Research and analyse financial information.
- Proven sales and negotiation skills.
- Punctual and well presented.
- Confident outlook.
- Good listener.
- Able to work individually or in a team.
- Open minded and non-judgemental.
- Attention to detail.
- Adaptable to new situations.
- Enjoy a competitive environment.
- High energy levels.
- Able to work under pressure.
- Problem solving.

References

Available on request.

Personal

Driving license: Yes
Nationality: British
Languages: Spanish

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