| ABARA FREDRICK  |
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| 7 Richard Street, Johannesburg • fredrickabara@gmail.com • +27310031429 |
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| SUMMARY |
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| Financial Advisor with 7+ years of experience delivering financial/investment advisory services to high-value clients. Proven success in managing multi-million-dollar portfolios, driving profitability, and increasing ROI through skilful strategic planning, consulting, and financial advisory services. |
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| PROFESSIONAL EXPERIENCE |
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| WELLS FARGO ADVISORS, Johannesburg, SASenior Financial Advisor | *August 2020–Present* |
| * Deliver financial advice to clients, proposing strategies to achieve short- and long-term objectives for investments, insurance, business and estate planning with minimal risk
* Develop, review, and optimize investment portfolios for 300+ high value clients with over $190M AUM (Assets Under Management)
* Ensure maximum client satisfaction by providing exceptional and personalized service, enhancing client satisfaction ratings from 88% to 99.9% in less than 6 months
* Work closely with specialists from multiple branches, managing investment portfolios for over 800 clients with over $25M in assets under care
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| SUNTRUST INVESTMENT SERVICES, INC., Pretoria, SAFinancial Advisor | *July 2017–August 2020* |
| * Served as knowledgeable financial advisor to clients, managing an over $20.75M investment portfolio of 90+ individual and corporate clients
* Devised and applied a new training and accountability program that increased productivity from #10 to #3 in the region in less than 2 year period
* Partnered with cross-functional teams in consulting with clients to provide asset management risk strategy and mitigation, which increased AUM by 50%
* Drummed up new business by cultivating solid relationships with clients, increasing the number of high-worth clients by 30%
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| EDUCATION |
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| CAPETOWN UNIVERSITY, SAMaster of Science in Financial Analysis and ConsultingUNIVERSITY OF JOHANNESBURG, SABachelor of Science in Business Administration (concentration: finance),  |  *August 2018**May 2014* |
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| ADDITIONAL SKILLS |
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| * Proficient in MS Office (Word, Excel, PowerPoint) Outlook, Salesforce, TFS Project Management
* Fluent in English, Chinese, and French
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