| 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, SA  Senior 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, SA  Financial 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, SA  Master of Science in Financial Analysis and Consulting  UNIVERSITY OF JOHANNESBURG, SA  Bachelor 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 | | | | | | |