

# Financial Advisor CV Example - Template

Telephone Number Here  
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**Professional Profile** As a financial advisor it is my duty to ensure that I give the most honest and sensible advice to people as possible. I can advise on all aspects of finance, such as debt advice, investing, mortgages, credit cards and loans and shares.

- Trustworthy.
- Sensible and practical.
- Approachable and Friendly.
- Mathematical.
- Highly organised.
- Neat and Tidy.
- Intuitive.
- Flexible.
- Adaptable.

**Professional Qualifications.** Registered Financial Advisor.

**Work History** **January 2010 - Present**  
Financial Advisor, BuyNSell shares, London  
Working for this small firm of Stock brokers it was my main duty to ensure that my clients were advised on investing their money in financially sensible share options. I worked with a variety of different clients who all had different levels of risk when it came to investing so I had to provide a tailored solution for each investor to ensure that they got the best possible returns for their money.

**January 2008- January 2010**  
Financial Advisor, Debt Free Masters, London.  
I worked for Debt Free Masters as a financial advisor in order to try and help people get out of debt, and manage their finances properly. I would have to log details of all of their debts and the amounts, and who the creditors was, and then devise a plan for the client to make repayment within their budget, or assist them in filing for bankruptcy or an IVA or other debt management solutions.

**January 2007 – January 2008**  
Financial Advisor, Camelot, London  
Working for the UK's leading lottery and gambling company as a financial advisor saw me dealing with newly made millionaires. I would have to meet with winners of substantial sums and help to guide them through the various aspects of handling such a large amount of cash. This would typically entail discussing high interest accounts, investment and trust options, advice on dealing with relatives and the public following such a windfall, and how to make the money grow.

**Education** GCSE 10xA Grades including English, Maths and Science.  
Londonberry Comprehensive School  
London  
2001

**References** References are available on request, or in writing to the above previous employers.

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