Dear Hiring Team,

I am pleased to introduce **Robert Morgan, CFA**, for the **Certified Financial Advisor (3152)** position based in Atlanta, Georgia.

Robert is a senior investment executive with more than **three decades of experience** in wealth management, investment strategy, and client advisory services. Across his roles at **Mosaic**, **Fulcrum Securities**, **Sethi Companies**, and **Fulton Financial Advisors**, he has consistently demonstrated excellence in both client-facing service and operational leadership.

He has managed portfolios totaling billions in assets under management, led advisory teams, and built infrastructure that supports both investment performance and outstanding client experience. Robert’s experience closely matches the core responsibilities of this role: processing client requests, managing custodian workflows, tracking CRM activity, handling document intake, and coordinating money movement. His familiarity with financial operations and compliance, combined with a strong command of Microsoft Office and portfolio systems, make him a valuable asset for any client-centric team.

In addition to his **CFA designation** and **Series 7, 24, and 63 licenses**, Robert resides in **Lawrenceville, GA**, and is fully available for this **onsite role in Atlanta**.

Please find his CV attached for your consideration. I believe Robert would be a high-impact addition to our client’s team, combining technical rigor with a personable, professional approach.

Warm regards,
**Derk Hoffstaetter**
Founder & Program Manager
OnlyHire.Me