

Dear Hiring Manager,

I am writing to recommend James Parker for the Client Service Associate position at your esteemed retirement and financial planning firm. With a solid educational background in Economics and extensive experience spanning over 18 years in financial services, James is exceptionally qualified to contribute effectively to your team.

James holds a Bachelor of Arts degree in Economics from SUNY at Old Westbury and has completed the Certified Financial Planner (CFP) designation program, demonstrating his commitment to professional excellence. His career trajectory includes significant roles such as Investment Advisory Support Analyst at Advisor Group, Premier Licensed Banker at SunTrust, and Financial Advisor managing high-net-worth clients. This diverse experience has equipped him with a deep understanding of financial planning, client relationship management, and advisory services.

In his current role at Advisor Group, James expertly handles inbound advisory service inquiries, navigates complex financial platforms including Wealth Management Platform, Managed Account Program, and Pershing EBS Platform, and processes trade-related reports with precision. He has a proven track record of building strong relationships with advisors and clients, ensuring timely resolution of margin account issues, and managing qualified retirement and trust accounts in compliance with IRS guidelines.

James is proficient with key industry software such as Orion, Eclipse, Schwab, and CRM systems, aligning perfectly with your firm's technological requirements. His work ethic is exemplary, consistently meeting deadlines while maintaining a positive and proactive attitude. His ability to educate advisors and clients on platform navigation and financial documentation further highlights his client-focused approach.

Given his extensive financial services experience, technical competence, and dedication, James Parker is well-prepared to excel as a Client Service Associate and contribute to your firm's success. I am confident that he will bring value through his expertise, professionalism, and commitment to outstanding client service.

Thank you for considering James Parker's application. Please feel free to contact me if you require any further information.

Sincerely,

Carola Blanco  
Recruiter