

Dear Hiring Manager,

I am writing to express our interest in the Client Service Associate position at your esteemed retirement and financial planning firm. We has a very competitive candidate: Porchè Bradley with a strong background in client operations, portfolio management, and financial advisory support, she is confident and experience align well with your requirements and that she would be a valuable addition to your team.

She holds an MBA in Business Economics and a Bachelor's degree in Economics, which have provided me with a solid foundation in financial principles and client service. Over the past several years, he has gained extensive experience in the financial services industry, most recently serving as a Portfolio Consultant and Client Service Specialist at Mercer Advisors. In these roles, She managed account implementations, facilitated client onboarding, processed investment transactions, and executed tax-efficient strategies to optimize client portfolios. My expertise includes working with platforms such as Envestnet, Aspen, and Salesforce CRM, and I am adept at learning new technologies quickly.

Her previous experience at Advisor Group and Wells Fargo Bank further strengthened her ability to deliver tailored financial solutions, support advisors, and maintain a high level of client satisfaction. She is well-versed in handling sensitive client information, managing deadlines, and adapting to fast-paced environments. Additionally, She has a proven track record of leading training initiatives and streamlining operational workflows to enhance service delivery.

We are particularly drawn to your firm's commitment to excellence in client service and financial planning. She is an eager to bring my strong work ethic, attention to detail, and positive attitude . He is confident that my background and dedication will enable me to contribute effectively to your organization's continued success.

Thank you for considering our candidate application.

Sincerely
Carola Blanco
Recruiter