

Aquita Sellmer

Financial Advisor

Profile

I am a Financial Advisor with extensive experience in the financial sector. I have worked with clients of all sizes and across industries to provide them comprehensive financial advice. My expertise lies in asset allocation, investment analysis, and portfolio management. With my years of experience, I have gained an understanding of the complex nature of finance and how it impacts businesses and individuals. I use this knowledge to help my clients make sound investments that will grow their wealth over time.

Employment History

Financial Advisor at Raymond James Financial Services, Inc. (Florida)

Feb 2022 - Present

- Generated \$30 million in new client assets under management through a combination of networking, effective marketing campaigns, and superior investment advice.
- Grew existing client investable assets by 15% last year through consistent proactive contact and regular reviews of portfolios ensuring that clients are on track to reach their financial goals.
- Led 10 successful seminars on retirement planning which resulted in 5 new clients with an estimated 2000 additional dollars in revenue each month from seminar attendees signing up for newsletters alone.

Senior Financial Advisor at The Strategic Financial Alliance, Inc. (Georgia)

Aug 2018 - Jan 2022

- Achieved total client assets under management of \$100 million.
- Generated new investment advisory and financial planning clients with over \$10 million in investable assets each.
- Successfully implemented an estate plan for a client worth over \$20 million that resulted in significant tax savings for the family
- Created and managed customized investment portfolios for high net worth individuals, resulting in annual returns exceeding 20% per year on average.
- Actively involved in philanthropy, serving on the board of directors for several local non-profit organizations.

Certificates

Series 7 (General Securities Representative Exam)

Jul 2020

Series 66 (Uniform Combined State Law Examination)

Feb 2019

Life and Health Insurance License

Aug 2017

✉ aquita.sellmer@gmail.com

☎ 683-477-0095

📍 4010 Governors Drive,
Montgomery, AL 36111

Education

Bachelor's degree in finance, accounting, economic at University of Washington, Seattle, WA

Sep 2014 - May 2018

I learned how to analyze and interpret financial data, prepare financial reports, and use relevant software applications.

Links

[linkedin.com/in/aquitasellmer](https://www.linkedin.com/in/aquitasellmer)

Skills

Analytical skills

Profit and loss analysis

Financial analysis

Finance

Asset management

Real estate investment

Business administration

Languages

English

Urdu