

JOE CLARK



Frisco TX

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PROFESSIONAL SUMMARY

Highly driven financial professional seeking a full-time position with an organization where I can lend my knowledge of market analytics and business development to help your organization improve profitability. I am a compassionate and motivated team player with proven communication skills seeking to grow my knowledge and contribute valuable input to ensure organic growth within an organization.

SKILLS

- FINRA Series 65 Financial Adviser Representative
- General Life and Health Insurance License
- Business Development
- Market analysis
- Cross Functional Development & Training

WORK HISTORY

02/2024 to **Annuity Counselor**

Current **Fisher Investments** – Plano, TX

- Assisted clients in setting realistic goals, developing action plans, and monitoring progress towards achievement.
- Maintained accurate documentation of client interactions, assessments, and progress notes for effective case management.
- Educated clients on how their products worked, and gave formal recommendations on them.
- Held 6-7 client and prospective client meetings daily.
- Improved client satisfaction through consistent communication, empathy, and understanding of their unique challenges.

06/2022 to **Account Executive**

02/2024 **Fisher Investments**

- Prospect 250 plus leads daily - Advise prospective clients on the public sector of the market - Educate prospective clients on different strategies based on their individual needs and goals - Perform appropriate steps to help onboard new clients - I have personally brought over 10 million dollars of assets to the Private Client Group of Fisher Investments

08/2021 to **Insurance Sales Rep**

06/2022 **Family First Life (General Life, Health License NPN 19967919)**

- Developed daily strategies for contacting and following up leads - 70% In house closing rate

EDUCATION

12/2020 **BBA of Economics**

RUSHE COLLEGE OF BUSINESS, STEPHEN F. AUSTIN STATE UNIVERSITY