

James Peterson

Financial Consultant

New York, NY

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[LinkedIn](#)

Financial consultant driving investment strategies and wealth management

Experienced financial consultant with eight years of expertise in investment management, risk assessment, and financial planning. Passionate about helping clients achieve financial success.

Professional Experience

Financial Consultant

Summit Wealth Advisors | New York, NY

May 2020 - Present

- Managed investment portfolios for high-net-worth clients, increasing returns by an average of 12% annually
- Develop retirement plans that optimized savings and tax efficiency for over 100 clients
- Provide risk assessment strategies, reducing financial exposure for corporate clients

Investment Analyst

Capital Growth Partners | Boston, MA

June 2015 - April 2020

- Conducted market research and identified investment opportunities, boosting client portfolio growth by 15%
- Created financial models to analyze risk factors and forecast returns
- Assisted in corporate financial planning, leading to a 10% cost reduction in investment expenses

Education

Columbia University at New York, NY | May 2015

Master of Science in Finance

Key Skills

Wealth management and retirement planning



Risk analysis and portfolio optimization



Compliance and financial regulations



Financial forecasting and budgeting



Investment strategy and asset allocation

