

# [Full Name], MBA, CFA

[City, State] | [Phone] | [Email] | [LinkedIn]

## Vice President of Wealth Management

*Revolutionizing Investment Solutions to Catapult Growth*

Month Day, Year

Company Name  
City, State

Dear Hiring Team:

As an award-winning investment executive recognized for designing and launching innovative financial product offerings, I am excited to submit my resume for your open position of JOBTITLEHERE.

Throughout my career, I have guided wealth management firms to create investment platforms that excel as revenue drivers. At [a global investment management firm], I oversee a consulting group that serves 1000+ clients with \$2T in assets. When I stepped into the role, I identified critical issues with the structure and tactical approach of the consultant team. Within three years, I reinvigorated the team, developed a work culture of accountability, collaboration, and innovation, and drove \$100B in new business.

As the Lead Strategist for the firm's US model portfolio suite, I evangelized the value proposition and earned the confidence of the company's partners and employees. To distinguish the offering from major competitors, I developed and amplified a compelling product message, sharpening a focus on the importance of risk in support of a strategic overweight of equity. After only two years of effort, I grew the business from \$0 to \$5B in AUM.

My background in quantitative research and as a portfolio manager bolsters my ability to translate technical concepts on behalf of diverse audiences. I pride myself on overcoming skepticism by combining my storytelling skills with my technical knowledge. In this way, I built partnerships with 120+ financial advisors and retail clients, supporting [an investment management firm]'s position as the largest ETF strategist in the US.

### Key Accomplishments Include:

- **Creating high-touch, high-expertise services** for RIAs, a majority with >\$500M AUM.
- **Scaling teams by recruiting industry-leading talent** and accelerating YoY business growth.
- **Winning the Great People Manager 2022 Award;** leading the team that won Commercial Partner of the Year 2020.

Please refer to the accompanying resume to provide you with further details of my qualifications in consideration for a position at your company. I would like to meet with you to discuss your specific goals. Please contact me via phone or email to arrange an interview. Thank you for your time and consideration.

Sincerely,

[Full Name], MBA, CFA