Anthony M. Johnson

[redacted]
Milwaukee, WI
[redacted]

Willing to Travel

Enthusiastic individual in search of a challenging role that obtains the necessary duties that provide gained skills to further my career within the financial industry. Proven track record of solid production, leadership, communication, and working in diverse environments, with teams as well as individually.

CORE PROFESSIONAL STRENGTHS

Relationship Management
Analytical and Problem Solving
Working in Fast-Paced Environment
Willingness to Learn
Compliance
Research
Five+ Years in Customer Service
Meeting and Exceeding Expectations
Taking on New Responsibilities

PROFESSIONAL EMPLOYMENT

Associate Regional Consultant – Allspring Global Investments, Menomonee Falls, WI July 2018–Present

- Develop and execute territory management plan to drive sales goals/objectives in Southern Illinois, Missouri and East Kansas region
- Cultivate and maintain partnerships with financial advisors across the wire, independent and RIA channel
- Analyze the competitive environment to position solutions to meet client need
- Effectively present each investment strategy's philosophy, process, and performance to assist with advisors due diligence

Client Service Consultant II - Wells Fargo Asset Management, Menomonee Falls, WI February 2017–July 2018

- Provide professional service to Financial Advisors and their clients
- Service and sales support to Associate Regional Directors and Regional Directors
- Proactively locate opportunity to help drive sales through reporting
- Create/analyze comparisons and hypotheticals to better position investment strategies

Client Service Consultant - Wells Fargo Asset Management, Menomonee Falls, WI June 2015–February 2017

- Responsible for retail client servicing
- Account maintenance/Trade processing
- Understanding/accommodating client needs
- Project Management

Research Remediation Analyst - Wells Fargo Home Mortgage, Milwaukee, WI September 2013–June 2015

- Preserve and protect assets while ensuring upkeep of company's reputation
- Research and analyze loan information, investor interest, and city codes
- Manage home equity accounts with intent of getting in compliance
- Handle multiple caseloads/task efficiently

EDUCATION AND LICENSES

Bachelor of Science, Double Major in Economics and Political Science, UWM Spring 2011

Digital Skills: Microsoft Word, Microsoft Power Point, Microsoft Access, Microsoft Excel, Zephyr Analysis, Morningstar Advisor, Financial Clarity

Professional Licenses:

- CFA Level II Candidate (November 2022 Exam Date)
- Series 7
- Series 63

AWARDS AND AFFILIATIONS

Foster Club Outstanding Young Leader
Certificate of Appreciation, Kappa Alpha Psi Fraternity Inc.
Mentor for BLMA at MPS
Board Member of Advisory Board, NAF at JMAC
Financial Literacy Volunteer for Secure Futures
Board Chair of CAVT Museums Inc.

References Available Upon Request