

# JACOB RICHMOND

CFP®, CPWA®, CIMA®

SENIOR MANAGER AT FIDELITY INVESTMENTS

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## SUMMARY

- Leading a team of 16 junior advisors while streamlining and optimizing processes to enhance efficiency and client outcomes.
- Highly organized and results-driven, enabling a focus on continuous professional development and impactful service.
- Proven collaborator and leader, consistently exceeding expectations in team initiatives and individual performance metrics.
- Lifelong learner with a passion for rapidly acquiring and sharing knowledge, ensuring excellence in facilitation and coordination.

## LICENSES AND CERTIFICATIONS

CERTIFIED FINANCIAL PLANNER®

Certified Private Wealth Advisor®

Certified Investment Management Analyst®

ACTFL Spanish Fluency Certification

Series 9 License: General Securities Sales Supervisor

Series 10 License: General Securities Sales Supervisor

SIE License: Securities Industries Essentials

Series 7TO License: General Securities

Series 63 License: Uniform Securities

Registered Product Owner

Certified ScrumMaster

## EDUCATION

**Brigham Young University**

Bachelor's in Computer Science

**University of Utah**

Master's in Business Administration (current, expected summer 2026)

## PROFESSIONAL EXPERIENCE

### Fidelity Investments

*Senior Manager / July 2022 - Present*

- Trained and mentored junior advisors on Fidelity's planning process, ensuring excellence in client discovery and planning conversations.
- Continued working with clients weekly to demonstrate excellence to my associates.
- Received recognition as Visionary Leader of the Year.
- Developed and deployed internal tools for Fidelity, including IRA rollover follow-up tracking, licensing performance reporting, and parking management systems, improving execution and operational efficiency for thousands of employees.

*Senior Help Desk Associate / Aug 2021 - July 2022*

- Handled client escalations as a designated manager-on-call, directly addressing high-priority issues to ensure client satisfaction.
- Achieved recognition as the highest-performing associate nationwide, consistently maintaining top metrics in client satisfaction and efficiency.
- Enhanced associate performance by serving as a subject matter expert on Fidelity's processes and systems.

*High Net Worth Service Associate / June 2020 - August 2021*

- Delivered personalized financial solutions and exceptional service to Fidelity's high-net-worth clients
- Consistently recognized as a top performer nationwide for exceeding client service and performance metrics, earning multiple awards.

## ADDITIONAL SKILLS

- Advanced proficiency in Microsoft Office, Excel, and artificial intelligence
- Extraordinarily quick at mastering new systems and technologies
- Exceptional time management and self-motivated work ethic, consistently achieving goals and exceeding expectations in any environment.