Eric Peterson

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Career Objective

Goal driven, self motivated and efficient individual, actively pursuing a challenging career opportunity as a Senior Financial Planner where I can utilise my tertiary qualifications and experience in the financial services industry. Actively seeking an achievement-driven opportunity to create and maintain profitable relationships with clients whilst maximising investment strategies designed to achieve and exceed their financial goals.

Education & Training

2003 - 2008
ADVANCED DIPLOMA IN FINANCIAL SERVICES (FINANCIAL PLANNING)
Deakin University & Kaplan

1987 - 1990
BACHELOR OF SCIENCE
University of New England | Armidale, New South Wales
(Major: Mathematics & Physics)

Professional Development

- Intermediate Excel, Word & PowerPoint Course
- Negotiation & Presentation Skills Course
- Cop To Coach (Staff Management)
- Familiar with Microsoft Project 2007
- Managing Several Projects & Deadlines

Demonstrated Skills & Abilities

- Staff Management, Training & Motivation
- Financial Planning & Advisory Services
- Investment Portfolio Management
- Participate in Ongoing Professional
- Business Set-up & Operations Management
- Conduct Consultations & Profile Customers
- Client Service Management & Consultation
- Accounts Payable & Receivable Functions
- Financial & Sales Reporting & Analysis
- Sales, Marketing & Business Development
- Cross-Cultural Communication & Negotiation
- Consult & Contribute in a Senior Management Team
- Relationship Building, Sustainability & Networking
- Provide Quality Customer Service & Support
- Advanced Computer Operation & Data Entry
- Review & Improve Company Polices & Procedures
- Office Administration & Clerical Duties
- Prepare Tenders, Contracts & Agreements
- Handle Customer Enquiries & Complaints
- Set & Meet Targets & KPI's Consistently

Computer Skills

- Microsoft Excel
- Microsoft Word
- Microsoft PowerPoint
- Microsoft Project
- VISIPLAN
- X-Plan
- Praemium
- ACT
- Internet and email
- Quick learner, keen to update

Employment History

2003 - Current **AFFINITY WEALTH SERVICES**
Sydney, New South Wales

Equity Business Partner, Practice Manager & Financial Adviser

Practice Manager

- Daily management of business across all areas including operations management, strategic planning, resource allocation, information and technology, OH&S, disaster recovery and human resources management.
- Regular communication with the Dealer Group Head Office and negotiation with suppliers.
- Staff recruitment and induction, staff training and performance appraisals.
- Finance reporting, forecasting, budgeting, profit and loss analysis.
- Develop, review and implement marketing strategies.
- Chair weekly staff and management meetings.
- Prepare and submit monthly business reports to other partners.

Financial Adviser

- Personal management of investment portfolios for 70 clients with various needs.
- Analysis of client needs and development of strategy to meet wealth creation or retirement goals.
- Gather clients' financial data such as income, cash flow, debts, loan repayments, investments and living expenses whilst identifying clients' goals, objectives and their attitude to risk.
- Analyse client's financial status in regard to their objectives and identify any issues or problems
- Prepare a written financial plan and assist clients in the implementation.
- Regular review and revision of financial plans based on changes in the client's needs and changes in investment markets and the economy.
- Refer clients to obtain services outlined in financial plan such as banking or insurance.
- Maintain a strong knowledge of changes in financial markets, the economy and relevant legislation.

Achievements

- Voted "Practice of the Year" nationally due to high level of competency and performance across all business areas including human resources, profitability, resource allocation and customer service (2005 & 2006).

2001 - 2003 **NTT COMMUNICATIONS**
Japan

Senior Corporate Account Manager - Australia

Key Duties:

- Sales of International Data Network to multinational clients demanding successful relationship building.
- Prepare Request for Proposals (RPF's) using high level written communication skills.
- Liaise with all level of management including Chief Information Officer and Chief Financial Officer.
- Prepare monthly reports and submit to the National Sales Manager regarding sales, threats, competitors and opportunities in the Australian marketplace.

1999 - 2001 **HUTCHINSON TELECOMS PTY LTD**
Perth, Western Australia

2000 - 2001 **State Dealer Channel Manager (WA)**
1999 - 2000 **Senior Dealer Channel Account Manager (NSW)**

Key Duties - State Dealer Channel Manager (WA)

- Manage, train, mentor and supervise 4 permanent Hutchison sales and administration team members.
- Responsible for sales targets, network expansion including negotiation with major shopping centre outlets.
- Implement and review OH&S procedures.
- Prepare reports including performance appraisals and monthly reports to National Dealer Manager regarding dealer outlet sales, marketing, industry competitors, training and network expansion opportunities.
- Develop Western Australia dealer network strategy in line with national sales and network expansion strategies.

Key Duties - Senior Dealer Channel Account Manager (NSW)

- Account Management of 100 mobile telephone dealerships within the Sydney and New South Wales region.
- Train, supervise and mentor junior Account Managers within New South Wales dealer team.
- Negotiate with Leasing Managers of major New South Wales shopping centres on behalf of dealerships.
- Negotiate on locations price per m2, fitout contributions and rent free periods.
- Prepare monthly reports to state management on dealer outlet sales, marketing, industry competitors, training and network expansion opportunities.

Employment History

1996 - 1998 **ONETEL PTY LTD**
Sydney, New South Wales

Dealer Account Manager

Key Duties:

- Account management of 70 mobile telephone dealership portfolio within the Sydney and New South Wales North Coast territory.
- Prepare monthly reports to National Manager on dealer network sales.
- Develop effective marketing strategic and research industry competitors.
- Train, supervise and mentor new staff members recruited within the OneTel team.

1991 - 1995 **TELSTRA MOBILENET**
Sydney, New South Wales

Corporate Account Manager

Key Duties:

- Account management of mobile and data requirements for portfolio of companies within the Information Technology sector, meeting sales targets and KPI's consistently.

Interests & Hobbies

- Actively involved in keeping fit and going to the gym, running, playing tennis and golf.
- Volunteered as a Starlight Wishgranter in 2008.
- Participated in the annual 'Sydney to Surf' charity run for Westmead Children's Hospital in Sydney.
- Presented talk to families, potential sponsors and community leaders at Bear Cottage (Division of Westmead Hospital) resulting in effective promotion, increased sponsorship and financial support.
- Participated in fundraising activities for Ironbark Ridge Primary School.

Personal Details

Nationality:	Australian
Health:	Excellent, physically fit, non-smoker
Interests & Hobbies:	Keeping fit, running, tennis and golf
Licences Held:	Current NSW Drivers Licence (own car)

Referees Available on Request