

Aria Vencora

Financial Planning Advisor

Miami, FL | aria.vencora@email.com | (305) 555-3481

Professional Summary

Experienced financial planning advisor with over 10 years helping individuals and families prepare for retirement, manage wealth, and meet long-term financial goals. Specializes in holistic planning and client education.

Work Experience

Senior Financial Advisor - BrightPath Advisors

Miami, FL | 2016 - Present

- Manage over \$25M in client assets.
- Conduct risk assessments, portfolio reviews, and retirement plans.
- Host monthly webinars on financial literacy topics.

Associate Advisor - SunTrust Financial

Miami, FL | 2012 - 2016

- Supported senior advisors in building tailored financial plans.
- Conducted market research and client onboarding.

Education & Certification

Certified Financial Planner (CFP)

University of Florida - B.A. in Economics

Core Skills

- Retirement Planning
- Wealth Management
- Client Relations
- Estate Planning
- Budgeting & Forecasting
- Risk Analysis