

JACOB RICHMOND

CFP®, CIMA®

SENIOR MANAGER AT FIDELITY INVESTMENTS

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📍 Lehi, UT

SUMMARY

- Leading a team of 20 associates 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 client 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 financial advising and wealth management.

LICENSES AND CERTIFICATIONS

CERTIFIED FINANCIAL PLANNER®

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

Lean Six Sigma Yellow Belt

EDUCATION

Brigham Young University
Bachelor's in Computer Science

University of Utah
Master's in Business Administration (current, expected 2026)

PROFESSIONAL EXPERIENCE

Fidelity Investments

Senior Manager / July 2022 - Present

- Trained and mentored newly hired associates on Fidelity's processes and licensing requirements.
- Continued speaking with clients weekly to demonstrate call excellence to my associates.
- Received recognition as Visionary Leader of the Year.
- Developed and deployed applications for SLC Leadership, including detailed licensing performance reports and a parking management system, improving operational efficiency for over 3,000 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 and timely resolution.
- 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 data analysis
- 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.