Priya Shah

Wealth Advisor

Wealth advisor with 5 years at Seattle wealth management firms, advising 85 families and tech employees with $160M in assets. Builds financial planning around equity compensation, estate planning and investment management, and logs every client touchpoint in Salesforce. CFP professional with Series 65 registration.

priya.shah@email.com (206) 555-0145 Seattle, WA linkedin.com/in/priyashah

EXPERIENCE

Wealth Advisor

08/2023 - Present

Puget Sound Private Wealth — Seattle, WA

Fee-only registered investment adviser with $1.1B in assets.

- Advise 85 families and tech employees with $160M in assets, adding $22M in net new assets in 2025.
- Model stock option and RSU sales for 30 tech employees, cutting projected tax bills by $400K in total.
- Review insurance, trusts and beneficiary designations with estate attorneys for every client at the annual meeting.
- Present quarterly investment reviews built in Excel and PowerPoint and hold 97% client retention since 2023.

Associate Wealth Advisor

06/2021 - 07/2023

Evergreen Harbor Advisors — Bellevue, WA

Wealth management firm with 7 advisors.

- Prepared 250 financial plans a year in eMoney for 3 senior wealth advisors, from first meeting to final review.
- Researched model portfolios and summarized ETF and bond fund options for the investment committee.
- Logged meeting notes, tasks and referrals in Salesforce, cutting average client follow-up time from 5 days to 2.
- Organized 6 client education events on estate planning, drawing 180 attendees in total.

Financial Planning Intern

06/2020 - 08/2020

Rainier Ridge Financial — Tacoma, WA

Summer internship at a 3-advisor practice.

- Built 30 client net worth statements in Excel from bank, brokerage and retirement plan statements.
- Researched long-term care and disability insurance quotes from 5 carriers for advisor meetings.
- Updated 400 contact records before the firm moved to a new CRM.

SKILLS

Financial Planning
Wealth Management
Estate Planning
Investment Management
Insurance
Salesforce
Excel
PowerPoint
Business Development
Communication Skills

EDUCATION

Bachelor of Arts

05/2021
University of Washington
Seattle, WA
Economics

CERTIFICATES

Certified Financial Planner (CFP)

06/2024
CFP Board

Series 65 License

09/2021
FINRA