



WILLIAM BERRY

🌐 Longmont, CO
☎️ (720) 614-4396
✉️ will@wsberry.com

Relationship Management | Brokerage Services | Client Engagement
Relationship-focused financial services professional with a track record of building trust, navigating complex client needs, and delivering highly personalized support in regulated environments. Brings sound judgment, curiosity, and a collaborative approach to deepening relationships and helping clients make informed financial decisions.

Experience

Charles Schwab & Co.

Licensed Financial Services Representative

Apr 2024 – Aug 2025 | Lone Tree, CO

- Managed 40–60 client interactions daily while maintaining 94%+ client satisfaction across brokerage and financial needs.
- Supported high-net-worth and Private Client relationships with complex accounts, multimillion-dollar transactions, and trade requests.
- Partnered with Financial Consultants, Private Client specialists, and the Trade Desk to coordinate timely client solutions.
- Used needs discovery and financial product knowledge to understand priorities, explain solutions, and connect clients with appropriate resources.
- Balanced personalized service, operational accuracy, and regulatory compliance while consistently meeting performance goals.

Transcending Creative

Lead Web Developer & Digital Strategist

Jun 2016 – Mar 2023 | Multiple Locations

- Led custom web projects from discovery through launch across development, CMS platforms, integrations, and digital marketing.
- Managed international programmers, coordinating priorities, timelines, revisions, and quality across concurrent projects.
- Served clients ranging from independent businesses to organizations featured by Forbes, CNN, Yahoo, and MarketWatch.

Loop Vintage

Retail Sales Associate

Apr 2023 – Apr 2024 | Boulder, CO

- Delivered personalized service to an affluent clientele through active listening, needs discovery, and tailored recommendations.
- Built customer trust through product expertise, clear communication, and attentive, personalized service.

Education

B.S. Business Administration

Expected: December 2027

Current GPA: 3.77

Metropolitan State University

Credentials

- FINRA Series 7
- FINRA Series 63
- Securities Industry Essentials (SIE)
- Colorado Public Notary

Skills

- Relationship Management
- Needs Discovery
- Account Servicing
- Client Advocacy
- Analytical Problem Solving
- Sound Judgment
- Cross-Team Collaboration
- Regulatory Compliance

