Michael Alexander Grande

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ACCOMPLISHED FINANCIAL SERVICES LEADER

Collaborative, revenue-focused Financial Consultant and Wealth Management Specialist (WMS) with progressive leadership experience and success working for two highly respected, global financial service organizations. Partners with diverse client base to ensure that client investments align with their unique financial objectives and risk tolerance. Visionary and dynamic leader with strong communication, presentation, problem solving, relationship building, and team leadership skills. Able to influence, motivate, and persuade team members to achieve desired outcomes and organizational goals. Areas of strength and expertise include:

Financial & Investment Advisory | Financial Analysis | Product Knowledge | Product Presentations
Sales Leadership & Consulting | Associate Training & Development | Project Management

PROFESSIONAL EXPERIENCE

Raymond James, *St. Petersburg, FL* **5/2015 — Present**
A public firm engaged in financial planning, investment banking, and asset management services.

- **Vice President – Product Manager** (1/2026 – Present)
- **Director – Portfolio Specialists** (9/2019 – 1/2026)
- **Vice President – Asset Management Consultant** (3/2019 – 9/2019)
- **Assistant Vice President – Product Specialist** (2016 – 2019)
- **Financial Consultant I** (2015 – 2016)

In Director of Portfolio Specialists role, serve as a subject matter expert for 57-person sales force. Provide daily leadership for 14 Sales professionals.

- Serve as the Sales Lead for the Marketing team, setting strategic direction, driving key sales campaigns, and developing new collateral.
- Act as the strategic owner of the Business Insights Analysts team, leading app integration initiatives and the development of UMA mapping tools.
- Drive new product solutions and rollouts for the Sales team by leveraging data insights and targeted segmentation strategies.
- Serve as a subject matter expert on managed solutions during By Invitation Only (BIO) visits with high-net-worth clients.
- Present the fee-based and managed platform as a subject matter expert to support advisor recruitment efforts.
- Lead quarterly Asset Management-focused webinars, engaging over 400 Raymond James Advisors.
- Spearheaded initiatives to transition client accounts to paperless access, resulting in a 17% increase in adoption.
- As VP Asset Management Consultant, traveled nationwide to provide one-on-one consulting with Financial Advisors, helping grow their practices and presenting managed products to groups of up to 20 Advisors in branch settings.
- In the AVP Product Specialist role, assessed client goals, assets, and risk tolerance using proprietary financial modeling tools to recommend tailored investment portfolios—achieving a 95% close rate.
- Collaborated with over 1,000 Financial Advisors across 10 states, developing customized financial solutions for a $200B client base, including ETFs, mutual funds, and SMAs aligned with individual objectives

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- Conducted in-depth analysis of client accounts to identify cross-selling opportunities and expand managed account share. Achieved a 55% client closure rate.
- In Financial Consultant role, created and presented in-depth financial plans for clients. Researched and compiled mutual fund asset allocations that aligned with clients' risk tolerance.

Bank of America Merrill Lynch, *Jacksonville, FL* 5/2013 — 5/2015
Merrill Lynch is owned by Bank of America and is engaged in prime brokerage and security dealings.

Officer | Senior Operations Analyst – Team Lead (Receipts) (2014 – 2015)
Senior Operations Representative (2013 – 2014)

In Senior Operations Analyst Team Lead role, led team that was responsible for bringing in new accounts to U.S. Trust, purchased by Bank of America. Responsible for the transfer of assets for high-profile, white glove branches that required personalized services for all levels of their transactions.

- Led efforts to streamline internal processes and partnered with Six Sigma Black Belt. Created SharePoint databases and VBA macros that reduced processing times for the department.
- Honored with the following achievements at Merrill Lynch:
  - Two time **Platinum Award Recipient** *(for extraordinary efforts on multimillion $ transfers)*
  - **Gold Award Recipient** *(for implementation of multiple macros, aiding business operations)*
  - Three time **Silver Award Recipient** *(for BAC Project 915; assisting various team members)*

OTHER PROFESSIONAL EXPERIENCE

Osprey Financial Group – University of North Florida, *Jacksonville, FL (6/2012 – 4/2013)*
Financial Analyst *(One of 10 students selected for the UNF Student Managed Investment Fund)*

Northwestern Mutual Financial Network, *Jacksonville, FL (5/2012 – 8/2012)*
Financial Representative Intern

EDUCATION | LICENSURE

Master of Business Administration (MBA), University of Florida (UF), Gainesville, FL

Bachelor of Business Administration (BBA), University of North Florida (UNF), Jacksonville, FL
Major: Finance | Upper level GPA = 3.5

- **FINRA Series 7; Series 66; FL 2-15** *(Life, Health, and Variable Annuities)*
- **Certified Investment Management Analyst® (CIMA®)**
- **Accredited Investment Fiduciary® (AIF®)**
- **Wealth Management Specialist℠ (WMS℠)**

TECHNICAL SKILLS | COMMUNITY LEADERSHIP

Microsoft Access, OneNote, Dynamics CRM, Excel & SharePoint; Tableau, Aladdin

Certified on Bloomberg for Fixed Income/Equities; Morningstar; Thompson Reuters; PSN, Callan; MPI