Lexie Radtke

Financial Planner

lexie.radtke@gmail.com
(655) 674-1972
Allentown, PA

Education

Master of Business Administration in Financial Planning at Saint Joseph's University

Mar 2019 - May 2023

Relevant Coursework: Investment Analysis, Risk Management, Estate Planning, Taxation Strategies, Retirement Planning, Financial Markets, and Portfolio Management.

Links

linkedin.com/in/lexieradtke

Skills

Excel

QuickBooks

Bloomberg

CRM

SQL

PowerPoint

Tableau

Languages

English

Russian

Profile

Dynamic Financial Planner with 2 years of experience in crafting personalized investment strategies and optimizing clients' portfolios. Skilled in risk assessment and financial analysis, committed to achieving clients' financial goals with precision and insight.

Employment History

Financial Advisor at Vanguard, PA

Mar 2025 - Present

- Developed personalized investment strategies for over 150 clients, resulting in a 20% increase in portfolio growth within two years.
- Collaborated with cross-functional teams to streamline client onboarding processes, reducing the time by 30% and enhancing customer satisfaction.
- Analyzed market trends and economic indicators to provide timely insights, boosting client retention rates by 15%.
- Conducted comprehensive financial reviews and risk assessments that led to a 25% improvement in asset allocation accuracy.
- Led educational seminars on retirement planning, increasing attendance by 40%, and deepening client engagement.

Financial Planning Associate at Fidelity, PA

Feb 2023 - Feb 2025

- Developed personalized financial plans for over 150 clients, resulting in a 20% increase in customer satisfaction scores.
- Streamlined investment portfolio management processes, reducing analysis time by 30% and improving decision-making efficiency.
- Collaborated with senior advisors to identify growth opportunities, contributing to a $2 million increase in assets under management within one year.

Certificates

Certified Financial Planner (CFP)

Nov 2023

Chartered Financial Consultant (ChFC)

May 2022

Memberships

CFP Board

FPA