



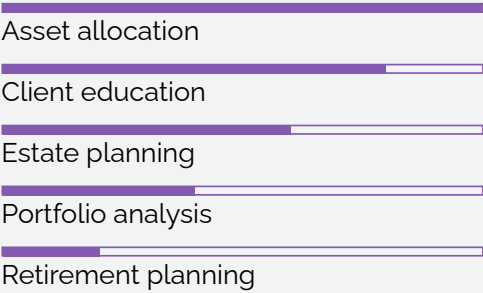
Skyler Lewis

Financial Advisor

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LinkedIn | Portfolio

Financial advisor with eight years of experience guiding individuals and small businesses through investment planning, retirement strategies, and wealth management. Known for increasing client portfolios and delivering personalized financial solutions.

Key Skills



Professional Experience

March 2019 - Present

Financial Advisor

Beacon Wealth Partners | San Francisco, CA

- Manages a \$38 million client portfolio across 120 households, increasing average portfolio value by 16% in 2023
- Developed personalized investment strategies that improved client satisfaction scores by 28% year over year
- Hosted 30+ financial literacy workshops, helping bring in 25 new high-net-worth accounts in the past year

June 2016 - February 2019

Associate Advisor

Redwood Financial Group | Oakland, CA

- Assisted senior advisors with client research, meeting prep, and investment recommendations across multiple asset classes
- Created retirement projection models and insurance plans, helping reduce client financial risk exposure
- Supported compliance reporting and documentation, maintaining 100% audit pass rate

Education

May 2016

Bachelor of Science (B.S.) Finance

San Francisco State University, San Francisco, CA

Certifications

Certified Financial Planner (CFP)

CFP Board | 2021

Series 7 and 66 Licenses

FINRA | 2017