Antonio Zotelo

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Financial Advisor | Supply Chain Manager | Service Client Manager

Ambitious, results-driven financial professional with a passion for helping clients build wealth, optimize financial strategies, and navigate complex financial landscapes. Adept at relationship management, investment advising, and high-stakes negotiations, with a strong track record of driving revenue growth and client satisfaction. Seeking a dynamic opportunity in banking, finance, or fintech sales, where I can leverage my analytical mindset, strategic approach, and exceptional communication skills to exceed expectations and deliver real financial impact.

WORK EXPERIENCE

AD Grand Logistics - *Mays Landing, NJ* 2018-2022

Supply Chain Manager

Managed high-level vendor negotiations, securing better contracts and optimizing logistics performance.

- Spearheaded cost-reduction initiatives, cutting storage costs by 4% and improving direct delivery efficiency.
- Developed and led a team of Jive high-performing supply planners, ensuring seamless operations.
- Applied data-driven insights to enhance forecasting accuracy and streamline supply chain workflows.

Infusion Capital - *Manhattan, NY* 2023-2024

Financial Advisor

Advised high-net-worth clients on financial planning, investments, and risk management, delivering tailored wealth-building strategies.

- Outperformed sales target by 25%, averaging deep market insights and strategic networking.
- Conducted portfolio analysis, identifying profitable investment opportunities in volatile markets.
- Strengthened client retention through exceptional relationship-building skills and proactive portfolio reviews.
- Maintained rigorous compliance with FINRA, SEC, and regulatory requirements while upholding ethical investment practices.

Timeshare Legal - *Egg Harbor Township, NJ* 2024-2024

Service Client Manager

Delivered high-touch customer service, guiding clients through complex legal and financial processes.

- Resoled high-volume casework, advocating for clients and negotiations to secure favorable financial outcomes.
- Resolved high-volume casework, advocating for clients and negotiating favorable financial outcomes.
- Maintained and organized confidential client records, ensuring compliance with consumer protection laws.

EDUCATION

Richard Stockton University - *Galloway, New Jersey*
Bachelors | Finance, 2029

Atlantic Cape Community College- *Mays Landing, New Jersey*
Associates – Business Administration, 2017

Egg Harbor Township High School - *Egg harbor Township, New Jersey*
Diploma - Architecture | Computer Aided Drafting – 2016

PROFESSIONAL SKILLS

- Mastery of Microsoft Office (Word, Excel, PowerPoint) and Google Suite (Docs, Sheets, Slides).
- Experienced in Microsoft Windows 10 and Mac OS X.
- Strong communication skills with a focus on team-building and customer relations.
- Excellent organizational, multitasking, and problem-solving abilities.

VOLUNTEER EXPERIENCE

Engin Program - *Ukraine* 2025
Nonprofit Organization

- Volunteer Online as a Conversation Partner

Licenses & Certifications

Real Estate License - *Manhattan, New York* 2023

- Strong verbal and written communication skills, active listening, and interpersonal relationship-building.
- Detail-orient with excellent organizational, time-management, and problem-solving skills.
- Experience preparing lease documents, resident files, applications, and bookkeeping tasks.

Leadership & Management Training (LoveWorks Academy) - *State of New Jersey* 2025

- State-approved professional development program focused on high-performance leadership in fast-paced, client-facing industries.
- Covered strategic planning, persuasive communication, team execution, and conflict resolution.
- Completed during a transitional career period to strengthen executive-level thinking, people management, and decision-making under pressure.

Securities Industry Essentials (SIE) License - *Mays Landing, New Jersey* 2025

- Qualified in ethical standards, trading practices, and risk management principles.
- Strong knowledge of fundamental securities concepts, investment products, and market regulations.
- Familiarity with FINRA rules, compliance regulations, and anti-money laundering (AML) principles.

Series 65 License – *(In Progress)* 2025

- Gaining expertise in investment advisory practices, fiduciary responsibilities, and portfolio management.
- Developing knowledge of securities regulations, client stability, and ethical standards under state federal laws.
- Preparing to meet industry requirements for providing fee-based investment advice, financial planning, and wealth management services.