



ISAAC RICHARD

Investment advisor

Experience

Analytical experience : 6 Years

Examinations

Broker / Investment Advisor

Series 66 - Uniform Combined State Law Examination (Aug 4,2017)

General Industry

Broker

SIE - Securities Industry Essentials Examination (Oct 1,2018)

Series 7 - General Securities Representative Examination (Jun 19,2017)

CRD No

6654082

<https://brokercheck.finra.org/individual/summary/5830441>

Employment History

12xwealth strategies

Ofinancial Advisor
07.15.2018 - Present

J.P Morgan Securities

Mass Transfer
07.2023 - 10.2023

First Republic Investment Management, Inc

Wealth Manager
03.2021 - 07.2023

Morgan Stanley Private Bank

Financial Advisor
09.2019 - 03.2021

MORGAN STANLEY

FA TRAINEE
08.2019 - 03.2021

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Centre

Language

- English

Expertise

- Management Skills
- Creativity
- Digital Marketing
- Negotiation
- Critical Thinking
- Leadership