



# William Anthony Roberts

## Experience

Investment Adviser-CHARLES  
SCHWAB & CO., INC.

(CRD#:5393) (08/29/2018 -10/22/2020)

Broker-MORGAN STANLEY

(CRD#:149777) (04/07/2011 - 08/08/2018)



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## Expertise

- ◆ Mathematical and financial modeling expertise for market dynamics, ROI, demand, elasticity, and pricing.
- ◆ Accounts under management - 84;
- ◆ Investment portfolios in progress - 69;
- ◆ Pamm accounts - 11;
- ◆ Staking funds under management - 7;
- ◆ Capital in management: \$8.9 million.
- ◆ Professional experience:
- ◆ -Experience in analytical activities: over 15 years

## About Me

I am a seasoned professional trader with a proven track record in the dynamic world of financial markets. With a passion for analyzing market trends and identifying lucrative opportunities, I bring a wealth of experience to the trading floor. My expertise spans various asset classes, including equities, commodities, and currencies.

## Skills Summary

**Series 66** - Uniform Combined State Law Examination , 06/30/2018

**Series 7TO** - General Securities Representative Examination , 03/15/2008

**SIE** - Securities Industry Essentials Examination, 10/01/2018

## Education

BUSINESS STRATEGY AND ANALYTICS  
"THE UNIVERSITY OF BUSINESS AND INTERNATIONAL STUDIES"