



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"