

Linda A. Bonavita

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Profile: Investment Professional with broad success in managing and enhancing high net worth clients' trust accounts. Proficient in market analysis indicators (e.g. MACD). Demonstrated ability to evince persuasive communication through written and verbal strategies suitable to clients' goals. Effective, confident leadership abilities and team player with multiple skill sets. Profit driven and management driven. Cross-functional talent in writing and research may be leveraged across various industries.

Professional Experience

2000 - September, 2009 **WACHOVIA/WELLS FARGO** | Morristown, NJ

Associate Director | Assistant Vice President | Portfolio Manager
Equity Strategies Group

- Managed 347 large cap equity personal trust accounts (\$258 Million) with "Know Your Client" (KYC) as a prerequisite for management.
- Strengthened client affiliations in alliance with relationship managers : a risk management perspective was part of the profitable success.
- Developed, constructed and wrote large cap equity investment proposals with success in delivery and implementation.
- Extensive research of S&P sector, industry groups and individual companies to determine portfolio inclusion suitability according to company policy and procedure.
- Retained 98% book of business in recessionary market.
- Conducted quarterly economic update sessions for peer groups.

Evergreen Portfolio Services

- Blended and managed book of business with Fixed Income, Equity , REITs and other Alternative Investment offerings.
- Pitched range of investment products to board of directors and charitable foundations.
- Represented Wachovia's Atlantic region on the "Uniform Principal and Income Act Committee".
- Reviewed accounts for suitability to move to Managed Strategies as an active member of the " MAP Review Committee".
- Transitioned applicable discretionary accounts to Managed Strategies target portfolios.
- Participated in company sponsored client prospect events to craft new relationships.
- Delivered and was commended on 100% accuracy for a clean book of risk management exceptions.
- Liaison for team on the "Wachovia Service Recovery Committee" to identify computer limitations.

1992 - 2000 **Trust Officer - Mutual Fund Specialty Group**

- Managed 400 proprietary mutual fund accounts on both the Investment and Trust sides.
- Profiled clients to determine Fund suitability, tax efficiencies and risk.
- Booked new business through lawyer contacts, existing client referrals and community events by 36% over previous year's goal.
- Exceeded annual fee goal for new business production by 25%.

1988 - 1992 **Unit Manger & Trust Specialist – Trust Operations Central System**

- Consultant for system conversion of Wall Street ticker symbols.
- Authored business requirements and training class documentation for new system.
- Wrote efficiency documentation for risk management requirements.
- Managed four employees in daily money market, commercial paper, stock & bond transactions.

1986 - 1988 **MONTCLAIR PUBLIC LIBRARY** | Montclair, NJ

Senior Assistant Librarian

- Managed Technology, Health & Science section. Selected & purchased new titles for this section.
- Wrote proposal and was awarded NJ Historical Society grant.
- Coordinated a Montclair, NJ school's radio commercial writing project.
- Judged NJ Library Association essay contest.

1980 - 1986 **MetLife** | New York, NY

Financial Research Analyst

- Developed yearly dividend formula with team effort.
- Performed cost analysis and audit feasibility studies.
- Analyzed procedures to improve GM policyholder system with 100% success in implementation.
- Analyzed company postage procedures and, as a result, wrote new procedures. Saved the company 10%.
- Lectured at two budget and expense conferences.

Education: Montclair State University | Montclair, NJ
Graduate Studies in Middle English Literature (Chaucer)

Caldwell College | Caldwell, NJ
B.A.- History | Minor - English

Professional Affiliations: Caldwell College Alumni Association
Economic History Society
Financial Executive Network
Global Wealth Management
Regulatory Compliance Association
Women's Executive Network (Wexnet)

Additional Affiliations: Nutley Little Theatre (Treasurer, House Manager, Season Planning Committee, Fundraising)

Habitat for Humanity
Choir member

Awards: New Jersey Historical Society Grant
Editor's Choice for poetry published by Noble House & Penhaligan Page Ltd., UK, Wales