

Ryan Framrose

New Client Acquisition Specialist

Poway, CA | [LinkedIn](#)

Financial services professional with experience in client acquisition, onboarding, and prospecting across wealth management and advisory firms.

EXPERIENCE

New Client Acquisition Specialist Wealth Enhancement Executes 150+ outbound calls and multi-touch email sequences daily to qualify prospects and schedule meetings for advisors, consistently exceeding appointment quotas. Works with Marketing and VP leadership to align outreach messaging with active campaigns and the firm's mission. Stays current on markets and wealth management trends to speak credibly about financial planning and independent RIA benefits.	Nov 2025 — Present <i>San Diego, CA (remote)</i>
Financial Services Intern Presidio Capital Management Managed administrative tasks including client correspondence, appointment scheduling, and CRM record maintenance. Handled high-volume inbound and outbound calls, addressing client inquiries and providing financial information. Assisted with portfolio management including asset allocation, rebalancing, and performance analysis.	Jul 2024 — Oct 2025 <i>San Diego, California, United States</i>
Financial Planning Intern Mariner Wealth Advisors	May 2023 — Aug 2023 <i>Newport Beach, California, United States</i>
Crew Member Trader Joe's	Jul 2021 — Jun 2024 <i>San Diego, California, United States</i>

EDUCATION

San Diego State University <i>Bachelor of Science - BS in Business Administration</i> Cumulative GPA: 3.82/4.00	Sep 2020 — May 2024
San Diego Miramar College <i>Associate of Science - AS in Business Administration and Management, General</i>	Aug 2020 — May 2022
Poway High School <i>High School Diploma</i> Activities and societies: Boys Volleyball	Aug 2016 — Jun 2020

PROJECTS

Investment analysis and risk management , J.P Morgan Chase Asset Management Virtual Experience Program Completed immersive virtual modules covering investment analysis, market trends, asset research, and risk-return evaluation. Applied risk management techniques to identify portfolio risks and implement mitigation strategies. Analyzed financial data and market indicators to make data-driven investment decisions.
Financial analysis and equity research , Finance & Investment Society - Microsoft Investment Pitch Conducted comprehensive financial analysis on Microsoft Corporation and pitched a buy rating to judges. Participated in weekly networking meetings with financial professionals and mentored underclassmen on academic and personal development.
Community improvement initiative , Boy Scouts of America Eagle Scout Project Managed all aspects of the Eagle Scout Project including budgeting, scheduling, resource allocation, and coordination. Facilitated weekly troop meetings and organized community service projects. Contributed over 250 hours of volunteer work to local charities and non-profits.

CERTIFICATIONS

Excel Skills for Business , Goldman Sachs	May 2023
Bloomberg Market Concepts , Bloomberg	Feb 2023
Asset Management Virtual Experience Program , J.P. Morgan	Jan 2023

SKILLS

Microsoft Suite · Salesforce · Bloomberg Terminal · eMoney · SQL · Bloomberg Market Concepts · Spanish · Farsi · Gujarati · Microsoft Excel · Microsoft Word · Microsoft Outlook
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