



Mayor of Providence

Brett P. Smiley

January 26, 2024

Honorable Members  
Providence City Council  
City Hall

Dear Honorable Members:

Pursuant to Sections 302(b) and 1103 of the Providence Home Rule Charter of 1980, as amended and Public Law, Chapter 45-50, Sections 1 through 31 passed in 1987, I am this day appointing Cristopher Llopiz Osorio, of 127 De Pasquale Ave, Providence, Rhode Island 02903, as a member of the Human Relations Commission for a term to expire on January 31, 2027, and respectfully submit the same for your approval. Mr. Osorio replaces Mr. González Trejo who has resigned.

Sincerely,

A handwritten signature in blue ink that reads "Brett P. Smiley".

Brett P. Smiley  
Mayor

IN CITY COUNCIL

MAR 07 2024

READ

WHEREUPON IT IS ORDERED THAT  
THE SAME BE RECEIVED AND APPROVED

A handwritten signature in blue ink, likely of the City Clerk, over a line.

CLERK

**Cristopher R. Llópiz Osorio, APMA, CRPC**  
127 De Pasquale Ave, Providence, Rhode Island, 02903  
(787) 299-2961 • [cllopiz22@gmail.com](mailto:cllopiz22@gmail.com) • [Cristopher Llópiz, APMA](#) | [LinkedIn](#)

## **EDUCATION**

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**Fairfield University**  
Bachelor of Science Major: International Business Minor: Accounting  
GPA: 3.27  
Honors: Dean's List

**Fairfield, CT**  
May, 2019

## **WORK AND LEADERSHIP EXPERIENCE**

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**Merrill Lynch, Pierce, Fenner & Smith Incorporate/ Bank of America**  
*Merrill Financial Solution Advisor, Assistant Vice President*

**Providence, Rhode Island**  
June 2023- Present

- Develop personalized comprehensive plans for clients that cater to their short-term and long-term goals
- Deepening relationship with current clients of Bank of America and Merrill to find impactful opportunities for advice
- Worked directly with our clients for their banking or wealth management needs
- Offer a high-touch service where I meet with clients quarterly, or more if the client's needs require it
- Analyze the risk of the client's total assets to ensure that the allocation is congruent with their risk tolerance
- Work with COIs to offer a spectrum of services to our book of business beyond their wealth management needs
- Establish S.M.A.R.T. goals for clients to increase the rate of success for the client to achieve their goals
- Conduct weekly meetings with our Merrill Financial Solution Advisor Elite Group in Providence Rhode Island

**TW Financial Group of Ameriprise**  
*Associate Financial Advisor*

**Cranston, Rhode Island**  
October 2020- May 2023

- Develop personalized comprehensive plans for clients that cater to their short-term and long-term goals
- Analyze the risk of the client's total assets to ensure that the allocation is congruent with their risk tolerance
- Work with COIs to offer a spectrum of services to our book of business beyond their wealth management needs
- Present alternative investments to clients for deeper asset risk diversification suitable to their needs and networth
- Track and review yearly goals with the client to ensure we are making progress towards the desired outcome of our plan
- Conduct monthly meetings as part of my membership of the Investment Committee to review our investment portfolio
- Provide complex comprehensive investment and asset planning in a simplified way
- Bestow clients with life and disability income insurance that cater to their protection plan needs

**Oriental Financial Group Bancorp.**  
*Retail Financial Advisor*

**San Juan, Puerto Rico**  
August 2019-October 2020

- Provided banking and investment products to help the client reach their short-term and long-term goals
- Analyzed the risk of the client's total assets to ensure that the allocation is congruent with their risk tolerance

**South Business Solutions**  
*Accountant Analyst*

**Santiago, Chile**  
September 2018 – November 2018

- Developed solutions and analysis to businesses that fit their budget, goals, market value, and their accounting
- Updated data information to increase efficiency in debt analysis and accounting for South American businesses

## **Additional Information**

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- Series 7, Series 66, SIE, Health and Life Insurance Licenses, APMA, CRPC
- President of the Puerto Rican Professional Association of Rhode Island (PRPARI)
- Proficient in specialized software (Canvas, Oracle General Ledger)
- Bilingual in English and Spanish
- Strong leadership and teamwork skills
- Highly enthusiastic and motivated
- Strong dedicated work ethic, willing to work all hours until the job is done