

## Jonathan A. Doe, CFP

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Bilingual Spanish/English

Highly motivated CFP with 5+ years of experience in financial reporting, auditing, and tax planning. Proven ability to streamline processes, reduce costs, and ensure regulatory compliance. Expertise in leading teams, analyzing financial data, and driving strategic decision-making to enhance profitability and efficiency.

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### RELEVANT EXPERIENCE:

#### Wealth Enhancement Group

August 2023 to Present

##### Financial Analyst

Charlotte, NC

- Engaged in over thirty high-net-worth client review and prospect meetings
- Developed university-level study group series based on emotional intelligence and practice management, reaching 60-100 employees per year
- Received the Kris Carroll Monthly Newsletter Award for creation of an RFP and Investment Portfolio
- Utilized Pershing Advisor Solutions and Schwab Advisor Center for a wide range of Associate Financial Advisor activities, e.g., trustee certification, designated beneficiary plan, account opening

#### TrinityPoint Wealth

May 2021 to August 2023

##### Financial Planning Associate

Charlotte, NC

- Engaged in client review meetings to gain exposure to the behavioral aspect of financial planning
  - Developed an 80/20, low-expense, moderate-aggressive, ETF-based model portfolio based on the market cycle and sector rotation
  - Analyzed ETFs and various mutual funds to determine if the value created by money managers warrants higher expense ratios
  - Conducted a retirement plan beneficiary audit to ensure all client retirement accounts have updated beneficiaries
  - Utilized Schwab Advisor Center, Fidelity Wealthscape, eMoney, and Orion Advisor Solutions for a wide range of Client Associate activities, e.g., account opening, money movements, financial projections, and custom reports/queries
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### EDUCATION:

#### Winthrop University

Rock Hill, SC

Bachelor of Science in Business Administration:

Graduated: May 2021

Concentration in Finance on the Financial Planning track

FINRA – Series 65 and Securities Industry Essentials

SCDOI - Property and Casualty Insurance License