



JACKSON TURNER

Certified Financial Planner

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PROFESSIONAL SUMMARY

Seasoned Certified Financial Planner with 7 years of experience delivering personalized financial solutions that empower clients to achieve their financial goals. Expert in comprehensive financial analysis and strategic planning, I focus on building enduring client relationships and adapting plans to changing needs. Passionate about guiding clients toward financial literacy and independence.

WORK EXPERIENCE

Certified Financial Planner

📅 Feb / 2021-Ongoing

Blue Sky Innovations

📍 Chicago, IL

1. Delivered personalized financial services, ensuring high levels of client satisfaction.
2. Analyzed financial situations to recommend effective solutions for diverse financial challenges.
3. Created detailed financial plans for individuals and businesses by assessing their assets, liabilities, and goals.
4. Provided a comprehensive suite of investment products tailored to client needs.
5. Oversaw \$20 million in client assets, optimizing investment portfolios for risk and performance.
6. Built a robust client base of 200, fostering strong relationships through trust and transparency.
7. Advised clients on investment strategies, estate planning, and retirement solutions.

Certified Financial Planner

📅 Feb / 2018-Feb / 2021

Summit Peak Industries

📍 Denver, CO

1. Founded a wealth management practice in Kentucky, emphasizing client-focused financial solutions.
2. Offered extensive financial planning services, addressing diverse client needs.
3. Established and managed a successful satellite branch for comprehensive financial planning.
4. Oversaw a total of \$75 million in client assets, ensuring optimal portfolio management.
5. Joined IPI to enhance local bank's investment program, aligning services with client expectations.
6. Integrated key financial planning elements into client offerings, enhancing service delivery.

EDUCATION

Bachelor of Science in Finance

📅 Feb / 2015-Feb / 2018

University of Kentucky

📍 Phoenix, AZ

Acquired comprehensive knowledge in financial analysis, investment strategies, and portfolio management.

SKILLS

Tax Planning



Estate Planning



Investment Strategy Development



Performance Measurement



Financial Education



Ethical Standards



INTERESTS

🎮 Gaming

👜 Fashion

🎬 Film

💻 Technology

STRENGTHS

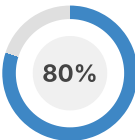
⚖️ Fairness

↔️ Flexibility

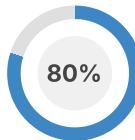
➡️ Forward-thinking

❤️ Gratitude

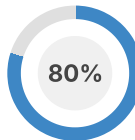
LANGUAGES



English



Mandarin



Polish

ACHIEVEMENTS

★ Successfully increased client portfolio performance by 30% through tailored investment strategies.

★ Implemented a client referral program that boosted new client acquisition by 25% within one year.