



AVA DAVIS



Retirement Education Specialist

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PROFESSIONAL SUMMARY

Dedicated Retirement Education Specialist with 7 years of experience in enhancing financial literacy and empowering clients to make informed retirement decisions. Proven ability to deliver engaging educational workshops and tailor presentations to diverse audiences. Passionate about simplifying complex retirement concepts and fostering trust in financial planning.

WORK EXPERIENCE



Retirement Education Specialist  Mar / 2020-Ongoing  Chicago, IL
Blue Sky Innovations

- 1. Delivered engaging onsite education and motivational seminars on financial topics to retirement plan participants.
- 2. Customized presentations to align with specific plan features, enhancing participant understanding.
- 3. Maintained up-to-date industry knowledge through ongoing education to ensure compliance and relevance.
- 4. Implemented a training measurement system to assess the effectiveness of educational programs.
- 5. Ensured compliant presentation topics and speaking points in adherence to industry standards.
- 6. Coordinated travel and logistics for educational sessions, maximizing outreach efficiency.
- 7. Conducted regional travel to deliver education sessions, reaching diverse audiences effectively.

Retirement Education Specialist  Mar / 2018-Mar / 2020  Chicago, IL
Lakeside Apparel Co

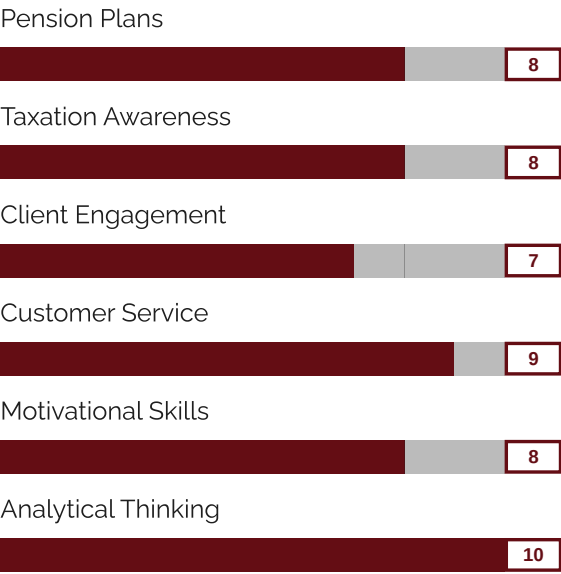
- 1. Guided 401(k) plan participants through processes regarding plan rules and IRS regulations.
- 2. Provided problem-solving support and follow-up with clients to address individual concerns.
- 3. Assisted participants with website navigation and online account maintenance.
- 4. Educated participants on retirement plan options and followed up to resolve issues.
- 5. Facilitated requests for account withdrawals, loans, and fund changes efficiently.
- 6. Maintained Series 6 and 63 FINRA licenses to ensure compliance in providing advice.
- 7. Developed and delivered retirement education programs, increasing participant engagement by 30%.

EDUCATION

Bachelor of Science in Finance  Mar / 2016-Mar / 2018  Denver, CO
University of Florida

Focused on financial planning and investment strategies.





SKILLS



INTERESTS

-  Gaming
-  Fashion
-  Film
-  Technology




STRENGTHS

-  Fairness
-  Flexibility
-  Forward-thinking
-  Gratitude

LANGUAGES



ACHIEVEMENTS

-  Delivered over 100 educational workshops, enhancing retirement literacy for participants.
-  Achieved a 95% satisfaction rate in participant feedback surveys on educational sessions.
-  Increased participant engagement by 30% through tailored educational materials.