

Pre-Appointment Kit 4

Advisor Biography

My Biography

Professional Experience

[Provide information such as years of experience, companies you've worked with and your current role. Provide a sentence or two about why you do what you do.]

Education

[Provide information regarding your industry designations and certifications.]

[If you are a CFP, include the following paragraph:]

[Advisor] is a Certified Financial Planner (CFP), so you can be sure that he provides expert and professional financial planning services. To earn the CFP designation, [Advisor] had to complete an approved educational program, pass a rigorous examination and meet stringent experience requirements. [Advisor] also adheres to a professional Code of Ethics and he fulfills annual continuing education requirements to remain aware of current planning strategies and financial trends.

[If you have any other designations directly related to a particular niche you are actively trying to grow be sure to showcase it here.]

[Provide information regarding any other education you may have (i.e. University or College).]



Personal Information

[Provide information related to your hobbies, recreational interests, volunteer positions, boards, family, etc. Only share information you are comfortable with.]