

JORDAN TOMPKINS

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HIGHLIGHTS OF QUALIFICATION

- Registered Investment Representative – Series 66 and 7 licensed
- Passion for assisting mass affluent clients - outstanding customer service skills and financial knowledge
- Ranked number one in District at Merrill - proven self-motivation and success, consistently exceed sales goals
- Consistently top referrer to business partners, resulting in sales
- Natural ability to product cross sell and build a client portfolio - constantly top producer
- Extreme attention to detail with extensive experience in working under pressure and meeting deadlines
- Strong ability to work as a team member and/or team leader, as well as give and follow directions

PROFESSIONAL EXPERIENCE

Management

- While managing time effectively, maintained, managed and exponentially grew a book of business– resulting in client success while exceeding personal and divisional goals
- Maintained, reviewed and successfully managed multiple forms, inventories, records, data systems, and historical reports– proven attention to detail
- Co-managed a team of nine colleagues –continuously rank top ten in state proving high production levels

Supervision

- Proven leadership, instruction and supervision skills – successfully leads teams by example
- Ability to diagnose and solve complex discrepancies with little to no room for error or supervision
- Supervised and maintained F-15 Strike Eagle fighter jets worth over \$31 million and over \$12 million in support equipment in the U.S. Air Force

Communication & Public Relations

- Serves on multiple boards throughout the community volunteering time and expertise
- Held morning morale conference calls and meetings improving production and branch success
- Proven ability to communicate effectively in diverse environments
- Helps eliminate conflicts in and out of the work environment with regard to everyone’s safety – continuously recognized through upper supervision for excellent customer relations

EMPLOYMENT HISTORY

- July 2016 – Current, **Financial Advisor**, Merrill, 9128 Strada Place Suite 301, Naples FL 34108 (239) 450-2352
- Nov 2015- July 2016, **Private Client Officer**, First American Bank, 3360 Pine Ridge Rd. Naples, FL 34109 (239) 963-3517
- Jun 2014- Nov 2015, **Personal Banker**, Bank of America, 9020 Bonita Beach Rd, Bonita Springs, FL 34135, (239) 992-1550
- Feb 2013 - Feb 2014, **Relationship Manager**, Key National Bank, 35401 Vine St, Eastlake, OH 44095 (440) 953-3041
- July 2010 - Feb 2013, **Assistant Branch Manager II**, Charter One Bank, RBS Citizens N.A., 38115 Euclid Avenue Willoughby, OH 44094, (440) 942-8600
- Dec 2009 - July 2010, **Teller** The Huntington National Bank, 9100 Mentor Avenue Mentor, OH 44060 (440) 266-1805
- Dec 2007 - Sept 2009, **Tactical Aircraft Maintainer**, U.S. Air Force, Hampton, Langley Air Force Base, VA 23665, (757) 764-9990

EDUCATION & CERTIFICATIONS

- **B.A. Degree**, Financial Management– Ashford University, Clinton, IA, obtained June 2013 (3.83 GPA, Maintained Dean’s List)
- **A.S. Degree**, Aviation Maintenance Technology - Community College of the Air Force, Maxwell Air Force Base, Alabama obtained August 2009 (3.74 GPA, Maintained Dean’s List)
- **U.S. Air Force Specialized Training**: Management, Leadership, Diversity, Communication, Customer Service, and Maintenance
- **Chartered Retirement Planning Counselor®**, College of Financial Planning
- **Florida 2-15 License, FINRA Series 7 License, NASAA Series 66 License**