

# Jennifer A. Miswald, CFP®

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## Career Focus – Wealth Management Financial Planning

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### Qualifications Profile

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- **CERTIFIED FINANCIAL PLANNER™** practitioner with 12 years' experience in the financial services industry working with clients ranging from \$1,000,000 to \$25 million in assets.
  - **Completed CERTIFIED FINANCIAL PLANNER™** designation in one-third the industry's standard completion rate (less than 1 year versus the industry's standard of 3 years).
  - **Easily establish high level of trust with clients** and associates by asking pertinent questions and by clearly communicating financial plans and recommendations.
  - **Lifelong learner:** ensure up-to-date knowledge and compliance with industry, state, and federal regulations. Regularly attend continuing education offered through Financial Planning Association of Southeastern Wisconsin and read *Journal of Financial Planning*.
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WELLS FARGO BANK, Milwaukee, WI; 2007- present

#### **Financial Planner (2004 – Present)**

Responsible for developing comprehensive, integrated and multigenerational financial plans for clients of The Private Bank. Working as a member of a multidisciplinary wealth management team focuses on cash-flow analysis, risk management analysis, education funding analysis, executive compensation, including stock option analysis, asset allocation, income tax planning issues and other estate and non-estate planning related issues.

MORGAN KENWOOD ADVISOR, Greendale, WI; 1999 – 2007

#### **Financial Planner (2004 – Present)**

Manage portfolios ranging from \$100,000 to \$2.5 million in assets with an average client portfolio at \$500,000. Review financial information to provide financial recommendations to individual, family, and small business clients. Prepare, implement and monitor financial plans.

Prepare advanced financial plans for president's clients with assets under management totaling \$400 million. Review clients' cash flow, liabilities, tax information, assets, estate planning documents, insurance documents, and real estate data. Set financial objectives.

#### **Client Relations Manager (2001 – 2004)**

Supervised and trained 9 client support specialists and paraplanners. Oversaw execution of plans, including security / insurance transactions. Participated in firm's strategic conversion from broker/dealer model to Independent Registered Advisory model.

#### **Paraplanner (1999 – 2001)**

Conducted preliminary planning meetings with president of firm to identify planning strategies for sale of security and insurance products. Taught financial seminars. Collaborated with client relations staff to ensure accurate and timely completion of paperwork for client security and insurance transactions.

**Jennifer A. Miswald, CFP®**

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### Professional Experience

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- **Nurse Executive**, The Shores Transitional & Rehabilitation Center; 1997 – 1998
- **Manager, Medical / Surgical Nursing**, Columbia/ Saint Mary's Hospital; 1993 – 1997
  - Directed operations and budget for 8 acute care units; managed team of 150.
- **Clinical Supervisor, Oncology/Hospice**, Seton Healthcare Services; 1989-1993
- **Patient Care Coordinator**, Milwaukee Hospice Home Care; 1987-1989
- **Staff Nurse**, Saint Joseph's Hospital; 1985-1989

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### Professional & Community Affiliations

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- **Active Member**, Financial Planning Association; 2004 – Present
  - Membership Committee; 2005 – 2006
- **Capital Campaign Chair**, Saints Peter & Paul Parish; 2004 – Present
  - **Spearheaded fundraising campaign yielding \$775,000.**
  - Brought \$400,000 renovation project in **\$3,000 under budget.**
  - Sourced contractor to repair water damage for two buildings for only \$28,000 – a **\$172,000 savings** from the original quote.

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### Industry Certifications

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KAPLAN COLLEGE, Boca Raton, FL

**Certificate, Financial Planning**

**CERTIFIED FINANCIAL PLANNER™** certificate, May 2004

**State of Wisconsin Insurance License for Property, Life, and Health**; 1998 – Present

**NYSE Series 7 certification**; 1998 – 2004

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### Education

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UNIVERSITY OF WISCONSIN – MILWAUKEE, Milwaukee, WI

**Master of Nursing Science**; 1991 • Minor: Statistics • GPA: 3.95

MARQUETTE UNIVERSITY, Milwaukee, WI

**Bachelor of Nursing Science**; 1985