<u>JORDAN TOMPKINS</u>

Naples, Fl 34120

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**

Jordan Tompkins

Merrill Lynch Wealth Management

Jordan Tompkins, CRPC®

Financial Advisor
Senior Portfolio Advisor

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What matters most to you matters most to me

Understanding your life priorities is an important part of how I work with the clients I serve. It's not just about markets and returns, it's about what matters most to you. I welcome the opportunity to show you how we can work together to create a financial strategy designed around you, your goals and your aspirations! I begin every relationship with a conversation, helping identify and prioritize which goals matter most to you. Whether it's transferring wealth to the next generation, customizing your financial approach to help you pursue your passions or providing advice and guidance to help you stay informed, I start by listening to learn more about you and your family.

Bio:

Jordan began his career in the financial services industry in 2010. He is committed to helping clients with their wealth management planning, investment management strategies as well as providing assess to private banking solutions from Bank of America. Utilizing a goals-biased approach in working with his affluent clientele, Jordan dedicates significant time to understanding factors that contribute to each clients financial goals and preserve your legacy for the generations to come.

Education:

Jordan served our great country in the United States Air Force prior to graduation with honors from Ashford University with a Bachelors in Finance. He is recognized by the college of Financial Planning as a Charted Retirement Planning Counselor[sm] designee.

Community Involvement:

Jordan serves on the Board of Directors for the Collier County Veterans Council, and is an active member of Grow Church, The Veterans of Foreign Wars Post 7721, Southwest Florida Veterans Alliance, and the Leadership Collier Foundation. Raising his family alongside his beautiful wife Danielle, they often find themselves enjoying time in the great outdoors with their two daughters Moreh and Anabella, along with the family dog Finn. They enjoy boating, fishing, swimming cycling, and golf.

Additional resources

Jason Albano
Bank of America, N.A.

Thomas Schneckner
Merrill Lynch, Pierce, Fenner & Smith Incorporated

Terry Strandberg
Bank of America, N.A.

Gail Heath
Bank of America, N.A.

What are your goals?

Offering you access to the investing insights of Merrill and the banking convenience of Bank of America to help you pursue your goals

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