Karren Tamulonis

Financial Planner

Profile

I am a Financial Planner with over three years of experience in the industry. I have worked with clients of all ages and backgrounds, and have helped them to achieve their financial goals. I am knowledgeable in investment planning, retirement planning, tax laws, and estate planning. I am passionate about helping my clients reach their full potential financially. I pride myself on being able to provide comprehensive and tailored advice that meets each client's unique needs.

Employment History

Financial Planner at Edward Jones, UT

Jun 2022 - Present

- Successfully managed $100 million in client assets.
- Achieved annual growth rate of 12% for clients' portfolios.
- Successfully navigated clients through the 2008 financial crisis.
- Helped 100 clients retire comfortably.
- Saved clients an average of $5,000 per year in taxes.
- Reduced investment fees by an average of 1% per year.

Associate Financial Planner at Merrill Lynch, UT

Sep 2019 - Apr 2022

- Successfully managed $200 million in client assets.
- Achieved annual revenue goals for 3 consecutive years.
- Exceeded quarterly sales targets by an average of 20%.
- Created and implemented financial plans for 50+ clients.
- Maintained a 97% satisfaction rating from clients.
- Received 6 awards for outstanding performance.

Education

Bachelor of Science in Finance at Brigham Young University

Aug 2014 - May 2019

Some skills I've learned are critical thinking, financial analysis, Excel, and PowerPoint.

Certificates

Certified Financial Planner (CFP)

Jul 2020

Chartered Financial Consultant (ChFC)

Nov 2018

Memberships

American Institute of Certified Public Accountants

National Association of Personal Financial Advisors

Details

karren.tamulonis@gmail.com

(806) 123-7689

1234 Main St, Salt Lake City, UT 84111

Links

linkedin.com/in/karrentamulonis

Skills

Financial analysis

Investment planning

Taxation

Risk management

Retirement planning

Estate planning

Insurance

Languages

English

French

Hobbies

Organizing personal finances

Studying personal finance blogs and articles

Creating a monthly budget