Tally Tock

Retirement Planner

Employment History

Retirement Planner at Blue Cross Blue Shield of Kansas, KS

Mar 2022 - Present

- Assisted 100 clients in developing retirement plans.
- Guided 50 clients through the process of enrolling in Medicare.
- Helped 30 clients navigate financial planning during retirement.
- Assisted 20 clients with estate planning and wills.
- Educated 10 client's on Social Security benefits and claiming strategies.
- Reviewed 5 client's investment portfolios and made recommendations for improvement.

Retirement Planner II at Fidelity Investments, KS

Sep 2018 - Jan 2022

- Successfully increased retirement plan participation by 10% through targeted education and enrollment campaigns.
- Successfully decreased the rate of employee attrition by 5% through developing more robust retention programs.
- Worked with employees one-on-one to develop personalized retirement savings plans, increasing individual account balances an average of 15%.
- Analyzed data to identify trends in employee behavior and made recommendations to improve outcomes.
- Presented at national conference on best practices for improving retirement readiness among diverse populations.
- Wrote monthly column for company newsletter on financial wellness topics.

Retirement Planner I at Vanguard, KS

Aug 2012 - Jul 2018

- Successfully developed and managed retirement plans for 100+ clients, with an average portfolio value of $500k.
- Achieved annualized returns of 8% or higher for 10 consecutive years.
- Successfully navigated 2 market corrections (2000-2002 & 2008-2009) by developing risk management strategies that preserved client capital and minimized losses.
- Regularly ranked in the top 5% of all financial advisors nationwide in terms of asset growth, return on investment, and customer satisfaction.

Certificates

Certified Retirement Counselor (CRC)

Apr 2021

Certified Financial Planner (CFP)

Oct 2019

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4800 Haverhill Rd, Shawnee, KS 66218

Education

High School Diploma at Wichita High School, Wichita, KS

Sep 2008 - May 2012

I've learned how to manage my time, how to study for exams, and how to do research.

Links

linkedin.com/in/tallytock

Skills

- Financial planning
- Retirement income planning
- Taxation
- Estate planning
- Investment management
- Insurance
- Risk management

Languages

- English
- Urdu