Cameron Becker

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Summary

Investment Advisor with experience building successful professional relationships. Providing excellent client-centric service & solutions in areas of financial planning, banking, wealth management & insurance needs.

Current licenses include: Series 7, 66, 63, NMLS, NAIC life & health insurance.

Former Arizona Real Estate license, AHIP Medicare, property & casualty insurance.

Graduate of Grand Canyon University with honors.
Graduate of Scottsdale Community College with honors.
Graduate student @ Arizona State University's Thunderbird School of Global Management.

Hobbies & Interests: Caddying @ Desert Mountain Country Club in North Scottsdale. Desert Mountain has 7 courses designed by Jack Nicklaus. Professional FAA Part 107 aerial drone operator & manager of Drone City LLC. Learning & practicing Spanish. Playing video games & enjoying spare time with friends & family. Attending shows, events & concerts.

Experience

Centralized Affluent Premier Banker

Wells Fargo Advisors

Sep 2022 - Present (5 months)

• Provide full-service banking to high value customers and oversee a portfolio of account relationships in a virtual environment.
• Consult with customers regarding their financial needs and recommend products and solutions to meet those needs in accordance with both inbound contact strategy and outbound outreach strategy.
• Collaborate and consult with Centralized Premier Banking colleagues, internal partners, and stakeholders, including internal as well as external customers.
• Resolve inquiries, open and service accounts (such as checking, savings, and credit/loans.)
• Identify customer investment needs and introduce partners when an investment need is identified through defined relationship models and team approach.
• Review and analyze basic business, operational, or technical assignments and challenges that require research, evaluation, and selection of alternative solutions.
• Guide medium risk deliverables within Centralized Premier Banking functional area.
• Present recommendations for resolving more complex situations and exercise independent judgement while developing expertise within Centralized Premier Banking functional area.
• Follow policies, procedures, and compliance requirements.
• This SAFE position has customer contact and job duties which may include the offering/negotiating of terms and/or taking an application for a dwelling secured transaction.

Caddie

CaddieNow
Nov 2020 - Present (2 years 3 months)
• Professional Fore Caddie @ Desert Mountain Country Club. Desert Mountain CC is a championship ranked country club located in North Scottsdale, Arizona. Established in 1986. There are 7 courses designed by Jack Nicklaus; 6 unique 18-hole courses, and an executive par-3 course, 7.
• Began with the nationwide CaddieNow program as a Junior Caddie. I quickly became promoted to Pro Forecaddie. Pro Forecaddies typically assist a diverse group of four guest golfers.
• Golfers come to play with different skill sets & ability levels. My duty is to guide them through the course's layout, find lost balls, read putts, clean clubs, wash balls, repair divots, ball marks and rake sand pits.
• I have worked the Mountain Mania event and also caddied for the Member Guest tournament. Members and guests include many top-level executives, successful entrepreneurs, business owners and well known media figures.
• Professional etiquette, poise, and manners are required throughout the round.

Sr. Associate Private Client Advisor

Charles Schwab
Jul 2021 - Jan 2022 (7 months)
• Acclimate & adapt to financial planning & client relationship management software.
• Applications include Envestnet MoneyGuide Pro, Thomson One, Salesforce, Microsoft Office, Workday, Genesys, Client Central, Advice Suite and Schwab's internal navigation system, Schweb.
• Answer client inquiries by gathering instructions through peer engagement, mentorship and Schweb's online file library. Submit proper client documentation for dedicated Private Client Advisors' requests.
• Become familiar with internal processes & procedures. Responsibilities include maintenance of client accounts, new account creation, transition to managed accounts, incoming asset transfers and other tasks requested by Private Client Advisor. Complete assigned responsibilities while following compliance and process guidelines.
• Schedule appointments for Private Client Advisors. During point of contact discover the client's investment preferences by asking open ended questions. Set expectations for upcoming meeting.
•Accurately record client interactions and email correspondence using a sophisticated Salesforce experience. Build rapport by discussing current life events, financial situation and investment strategy preferences. Utilize Salesforce's Chatter to inform internal partners of updates on client records. Generate Process Management Guide reports to organize & filter Private Client Advisor's practice.
•Contribute incoming asset transfer referrals to territory branch Financial Consultants.
• Adhere to standards of business conduct & ethics.

Financial Solutions Advisor

Bank of America Merrill Lynch
Jul 2020 - Jun 2021 (1 year)
• Assist with inbound & outbound client service calls. Proactively transitioning to solution oriented opportunities.
• Build confidence & trust by following Bank of America's True Advisor Excellence call structure for professional consistency, accuracy and detail.
• Explain differences and expenses between mutual fund & ETF products offered in brokerage's core portfolio solutions versus Merrill's alternative platforms; self-directed investing, CIO guided investing, CIO guided investing with an advisor, and Merrill Global Wealth Investment Management.
• Discover & prioritize short, medium & long-term investment objectives through goals capturing. Prioritize goals to needs, wants & wishes.

• Define client's life stage, specify time horizons, clarify current & outside investment strategy while discussing liabilities, cash flow, & liquidity needs.
• Make complete, individualized recommendations specific to the client's unique situation.
• Provide customized rebalancing & financial planning roadmaps using Monte Carlo Simulations. Confirm client's understanding, set expectations for further conversation, communication & planning.
. Provide clients with preferred rewards discount offerings, cash back credit card programs & consumer loan options such as mortgages & auto loans through Bank of America
• Navigate Salesforce Lightning to accurately record client interactions. Thoroughly document conversation topics, email communication, updates to account; life events, balanced growth asset transfer opportunities and additional details regarding client's unique relationship with Bank of America.
• Perform new account creations, incoming transfers, rollovers, and consolidations using Merrill's rep-assisted asset transfer & rep-initiated online account opening system.
• Assist with digital adoptions; online enrollments, electronic delivery options & other Bank of America online business initiatives.
• Adhere to business standards of conduct, ethics, & regulation.

Medicare Benefit Advisor

Cigna

Sep 2019 - Mar 2020 (7 months)

• Answer inbound phone calls serving Medicare beneficiaries. Identify key information through active listening and probing.
• Discover client care needs and plan suitability. Determine primary care provider, medications, pharmacy locations, premium, co-insurance, co-payment, deductibles and other important price information preferences.
• Use Salesforce to document inbound, outbound and follow up calls. Schedule client appointments and seminars with field agents. Provide detail on other important information pertaining to client's needs & preferences.
• Complete online enrollment application over the phone with detailed, accurate and required information which is consistent with AHIP product requirements and Medicare enrollment guidelines.
• Meet goals & metrics established by Cigna. Key metrics measure sales quota, attendance, quality scores, adherence to compliance and other performance criteria.
• Maintain requirements for AHIP agent licensure, company licensing appointments and annual product certification.

Financial Advice Consultant

Vanguard

Sep 2017 - Jul 2019 (1 year 11 months)

• Served in Vanguard's Select Services Department. A specialized demographic of clientele ($500k-$1M) with a high propensity for approaching retirement, needing rebalancing assistance, or help from a Vanguard Financial Advisor.
• Use an effective call structure to evaluate exclusive needs while proactively discussing topics beyond stated reason for calling.
• Demonstrate active listening & attention to detail. Recognize verbal cues in the conversation and visual cues within the portfolio which identifies a need for an investment conversation with a Vanguard Financial Advisor.
• Assess client's current life stage, current & future life events and time horizon to accomplish goals.
• Discuss current & outside investment strategy. Define time, willingness, and ability to reach goals. Provide opportunities to discuss potential incoming asset consolidations, rollovers, & transfers.

• Differentiate Vanguard's unique advice offer from competing firms. Explain Vanguard's best-in-class corporate structure. Provide detail regarding features and benefits available through Vanguard’s low-cost advice solution & reputable proprietary products.
• Utilize Salesforce to schedule appointments and document details of interaction. Provide the client with an overview of what the scheduled meeting will entail. Confirm client expectations & recap our discussion. Inform them of the Client Investor Profile required which provides important, additional financial information. Explain the Investor Profile allows the appointed advisor to further understand the scope of their financial picture.
• Understand Vanguard’s Principles for Investing Success, Advisor’s Alpha, and the complete lineup of available mutual funds in addition to brokerage services offered.
• Adhere to company initiatives, compliance policies, rules & regulations. Successfully excel beyond key metrics measured such as adherence, attendance, customer satisfaction and weekly appointment goals.

Registered Brokerage Investment Agent
Vanguard
Feb 2017 - Jan 2018 (1 year)
• With excellent customer service we served a broad variety of investors from all demographics. Helping them meet and maintain their personal financial goals through active listening, answering inquiries, service needs, and more.
• Use effective client relationship management to perform trade processing, account creation, asset transfers, rollovers. Build rapport to open conversations about investment strategy. Perform discovery & guidance conversation regarding unique current & outside investment circumstances. Provide referrals to business development for large incoming asset transfers and rollovers.
• Positioned appropriate products and solutions avoiding dialogue that could potentially manipulate a client's decision, or be misconstrued to confuse or mislead them.
• Demonstrated the Vanguard model of treating clients fairly and giving them the best chance for investment success with respect to their savings and individual financial management needs.
• Utilized Salesforce and navigated Vanguard’s proprietary technology systems to connect with clients and serve their needs.

Owner
Cherub Media
May 2014 - Feb 2017 (2 years 10 months)
• Formed Cherub Media in 2014. It became a Certified Google Partner company same year.
• Developed internet marketing campaigns; specializing in Google Ads & Analytics.
• Freelanced through Elance/UpWork; a global network of freelancing opportunities. As a sole-owner of the LLC, produced on average, 15 hours of work per week. The duties included market research, construction of strategic marketing campaigns, optimizations, and web analytics reports.
• Worked remotely with a team of marketers for a Fortune 500 company. Lionbridge is the largest translation software company in the world. The contract lasted two and a half years. Towards the last 6 to 8 months I specialized in LinkedIn advertising.
• Consulted with a marketing director to market the largest Internet of Things (IoT) conference, (IoT World Series.) Informa sponsored the event. It took place in San Jose, California in 2016. We advertised through Gmail email and video advertisements on YouTube.
• Served several other small to medium-sized business accounts in the technology sector; focusing primarily on search advertising. Those companies were referrals.

Multiple Line Insurance Agent

American National

Sep 2014 - Sep 2015 (1 year 1 month)

• Serve the insurance needs of local individuals, families and business owners with multiple lines of insurance. Emphasize that proper insurance protection which insures one's investments, lifestyle, and financial future is more valuable than purchasing the cheapest option or buying simply on price.
• Generate new business by means of direct marketing; which include door-to-door campaigning, disbursement of print advertisements, online presence management, digital advertising, cold-calling, event marketing, and professional referrals.
• Provide opportunities for existing and prospective clients to ask questions about current policies, discuss additional coverage options, features and discounts they are eligible to receive through American National.

Education

Grand Canyon University

B.S. Applied Business Management, Business Administration and Management, General

2018 - 2020

Scottsdale Community College

Associates of Arts, Business Entrepreneurship

2009 - 2012

Thunderbird School of Global Management

Masters of Leadership & Management, International Business

Dec 2022 - Present

Licenses & Certifications

Life & Health Insurance - National Association of Insurance Commissioners (NAIC)

17351672

Arizona Real Estate License - Arizona Department of Real Estate

Issued Dec 2016 - Expires Dec 2020

SA669210000

Series 7 - General Securities Representative - FINRA

6756634

Remote Airman Certificate - U.S. Department of Transportation

4288520

AHIP Medicare - AHIP

Series 66 - Uniform Combined State Law - NASAA
6756634

NMLS - NMLS
2052265

Skills

Financial Planning • Personal Financial Planning • Financial Advisory • Financial Goals • Client Services • Customer Service Management • FinTech • Financial Management • Financial Services • Account Management

Honors & Awards

Grand Canyon University's President's List - Grand Canyon University
Dec 2018

Most Evaluations 2018 - 2019 - Toastmasters - Toastmasters
Jun 2019
Presented the most evaluation speeches in Vanguard's Burnt Toast Toastmasters club.

Grand Canyon University Dean's List - Grand Canyon University
Oct 2019