

# Kellie M. Masters

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## EDUCATION:

Iowa State University <i>Masters of Family and Consumer Sciences – Family Financial Planning</i>	Ames, Iowa December 2006
Iowa State University <i>Bachelor of Science - Finance</i>	Ames, Iowa August 2004

## WORK EXPERIENCE:

WEALTH ADVISORS OF IOWA, LLC <i>Financial Planning Manager</i> <i>Operations Specialist</i> <i>Paraplanner</i> <ul style="list-style-type: none"><li>▪ Lead development and implementation of retirement readiness program for clients</li><li>▪ Provide financial planning advice to clients</li><li>▪ Serve as a client advocate</li><li>▪ Manage compliance requirements for the firm</li></ul>	West Des Moines, Iowa December 2015 – present July 2009 – November 2015 July 2007 – June 2009
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## CERTIFICATIONS AND AWARDS:

CERTIFIED FINANCIAL PLANNER <sup>TM</sup>	February 2014
WAUKEE LEADERSHIP INSTITUTE GRADUATE	May 2012
INVESTMENT NEWS 40 UNDER 40 HONOREE	June 2015

## VOLUNTEER EXPERIENCE:

MONEY SMART WEEK IOWA <i>Des Moines Area Coordinator</i> <i>Youth Outreach Committee Chair</i> <i>Partner</i>	West Des Moines, Iowa October 2013 – present July 2009 – November 2015 July 2007 – present
WAUKEE LEADERSHIP INSTITUTE <i>Graduation/Alumni Outreach Committee Chair</i> <i>Board Member, Secretary</i>	Waukee, Iowa January 2016 – present July 2013 – present
GIRL SCOUTS OF GREATER IOWA <i>Troop Leader</i>	Waukee, Iowa October 2013 – present
SAINT BONIFACE CHURCH <i>Faith Formation Teacher</i>	Waukee, Iowa September 2015 – present