**Mike Barratt**

Email: mlbarratt@gmail.com

Cell: 515-979-0213

VP- Financial Consultant Charles Schwab 2008 – Present

1. Developed a $400 Million financial services practice
2. Grown advised solutions business to $120 Million in 6 years
3. Area leader in Financial Plans delivered to clients 2014
4. EDGE Sales Process & Relationship Development Early Adopter and Champion
5. Build relationships with Schwab clients, engaging them with their financial goals, helping them set compelling goals and developing a personalized financial plan with actionable steps
6. Circle of Excellence- 6 times

Financial Advisor Vantus Bank 2005 – 2008

1. Grew assets by $20 million in 3 years
2. Lead discussions on relationship development, consultant financial planning process and needs based selling
3. Cultivated relationships with banking partners to develop referral and prospecting system
4. Organized and hosted educational workshops to keep investors informed of relevant financial information, new products and services that would benefit them
5. Developed network with outside partners to leverage external resources and develop referrals

Financial Advisor H&R Block Financial Advisors 2000 – 2005

1. Marketed and developed $38 million financial services practice
2. Early adopter to relationship selling and fee based advisory business
3. Developed strong work ethic by working weekends and nights for first 2 years in the business
4. Built business through cold calling, networking and developing relationships with unassigned clients

Licenses Held

1. Series 7, 6, 63, 66, Life and Annuities

Education Coe College 1997 – 2000

1. Bachelor of Arts
2. Majors: Economics, Business and Administration

Community Involvement

1. Board of Directors Food Bank of Iowa July 2014 – Present
2. Board of Directors Variety Club of Iowa/Young Variety 2013-2015
3. WAM/Wine, Art, Music Co-Founder 2012-2013