**Buck Olsen, CFP®**

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515-979-3807

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**Professional Experience**

Foster Group West Des Moines, IA United States

*Advisory Services Group - Leader January 2014 - present*

* See Attached 2016 Objectives – Exec Summary
* See Attached Performance Agreement

*Chief Marketing Officer May 2012 – December 2013*

* Uncover, vet and integrate business growth opportunities as they relate to the vision & mission of the firm
* Lead and monitor the marketing framework for the firm that will drive our new business development initiatives and fuel our growth
* Lead (Coach / Player) the Institutional and Qualified Plan business units with excellence and enthusiasm
* External - Ensure that our promise and our message are aligned with current and perspective client expectations
* Internal - Bring best thinking and ideas as it relates to Marketing & Business Development to conversation for feedback, consideration and affirmation. Identify and provide recommendations about strategic issues the company faces

*Shareholder of Foster Group, Inc. Jan 2006 – present*

*Marketing & Business Development Leader Jan 2005 – May 2012*

* Communications process oversight and refinement - raise the bar on all communication to clients, prospects, strategic alliances, broader community
* Marketing strategies - development and execution of show-up events (awareness / accountability), strategic relationships, identify & secure platforms for speaking engagements
* Brand development, enhancement, refinement, and oversight as it relates to all elements of our brand
* Awareness strategies oversight and execution as it relates to partnerships, sponsorships, advertising, community awareness, news & media and industry publications

*Operations Leader Jan 2003 – Dec 2004*

* Review and refine all internal business systems and processes, increasing efficiency and ensuring consistent delivery of all of our services to our clients
* Lead the Client Services and Operations teams with excellence and enthusiasm
* Openly communicate project timelines and status, and to complete assignments with integrity and skill
* Vendors- Consistently communicates expectations and improvement ideas with technology vendors

*Associate Planner May 2000 – Dec 2002*

* Support Advisors in the delivery of our Wealth Management services
* Construct and update financial plans
* Coordinate meeting preparation, communication with outside advisors, and research of complex planning topics

**Education**

**Simpson College** **Indianola, IA United States**

*Bachelors Degree, Management & Finance , May 2000*

**College for Financial Planning** **Denver, CO United States**

*CFP Certification Professional Education Program, July 2003*