



Anthony L. Ranallo

CFP®, CIMA®, CPWA®

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## Professional Profile

Anthony is a Senior Vice President with Merrill Lynch in Des Moines, Iowa where he oversees a 4 person wealth management advisory team. Our practice currently advises attorneys, physicians, business owners, and corporate retirement plans. For individuals, we provide value to our clients with our extensive background in investment analysis and asset allocation. We oversee all aspects of your financial life, offering the following customized services:

- Investments
- Retirement Planning
- Trust and Estate Planning Services
- Banking & Cash Management Services

## Work Experience

*Ranallo Group @ Merrill Lynch*

*Senior Vice President*

*Wealth Management Advisor & PIA Portfolio Manager*

06/2008 – Present **Merrill Lynch, Des Moines, IA**

*Retirement Plan Consultant – Investment Specialist*

08/2005 – 06/2008 **Holmes Murphy Financial Services, West Des Moines, IA**

*Financial Advisor – Investment Management Analyst*

5/2002 – 07/2005 **Smith Barney, Des Moines, IA**

## Education

05/2006 College for Financial Planning, Greenwood Village, Colorado

- Master's Degree
- M.S. Financial Planning. Cumulative GPA 3.42

5/2002 Arizona State University, Tempe, Arizona

- Bachelor's Degree
- B.S. Finance. Cumulative GPA 3.56 – Cum Laude

## Awards, Achievements & Special Recognition

2013 Circle of Excellence Advisor – Merrill Lynch

2012 President's Club Advisor – Merrill Lynch

2011 President's Club Advisor – Merrill Lynch

## Civic Leadership

Locally, Anthony is active with numerous non-profit organizations. He is on the board of the Des Moines Community Playhouse and the Central Iowa Center for Independent Living. For the last two years, he was the Philanthropy Chair for the Ambassadors Club, a local organization of young business professionals. In these roles, he is able to give back to the community by assisting these organizations with their fundraising, board oversight, event planning and help further their overall mission.

## Business Accomplishments

Tony has excelled ever since joining the financial services industry in 2002. In the five years following graduation, he completed his Master's of Finance and was also one of the youngest professionals in the country to attain the CERTIFIED FINANCIAL PLANNER (CFP®) certification, awarded by the Certified Financial Planner Board of Standards, Inc. Following completion of his CFP® certification, he completed post graduate work at the Wharton School of Business, University of Pennsylvania and the Booth School of Business, University of Chicago. During these studies, he completed The Certified Investment Management Analyst™ (CIMA®) designation, a program that is recognized as the standard for advanced investment consulting and the Certified Private Wealth Advisor<sup>SM</sup> (CPWA®) designation, an advanced credential created specifically for wealth advisors who work with high-net-worth clients on the life cycle of wealth.

Anthony's group, The Ranallo Group, is among the most elite teams within Merrill Lynch with production that falls in the 96% percentile and assets under management of over \$225 million.