

# MARI BUNNEY

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## PERSONAL SUMMARY

- Confident public speaking skills – developed through Toastmasters and numerous presentation contests
- Passion for educating people, particularly women, about the basics of investing and the importance of financial planning
- 15 years of financial services experience
- Ability to “think outside the box” in approaching marketing, sales, and event planning
- Series 6, 7, and 66 licensed

## EMPLOYMENT HISTORY

### **RBC Wealth Management Financial Advisor**

2015-present

*Des Moines, IA*

- Manage and build wealth for Individuals and Families
- Focused on engaging and building financial confidence in women
- Partner with clients to provide a Purposeful Wealth Plan, a customized Investment Strategy, and an ongoing *Purposeful Women's Wealth Program* to intentionally educate women around important financial topics

### **Principal Funds**

2011 — 2015

#### **Associate Regional Director**

*Kansas City, MO*

- Conducted Social Security and Medicare Seminars for advisors and their clients
- Consulted with advisors on how to grow their practice and improve their investment performance
- Organized a “Suits for “Soldiers” Drive and collected nearly 100 suits, shirts, and ties for veterans to wear to work and interviews
- Grew sales in territory by 33%

#### **Internal Wholesaler**

*Des Moines, IA*

- Won the “Ultimate Presenter Contest” in 2012
- Assisted Regional Director in developing meaningful and long-lasting relationships with advisors in territory
- Built an in-depth understanding of Principal Funds’ products as well as their key competitors

### **Associate Financial Consultant, Charles Schwab**

2010 — 2011

*Des Moines, IA*

- Proactive outbound calls, partnered with subject matter experts, peers, and managers
- Met with clients and prospects to identify goals and objectives and assisting them in executing an investment strategy to achieve those goals
- Presented numerous workshops covering various topics relevant to investing and retirement planning

### **ING Funds**

2005 — 2009

#### **Regional Director**

*Scottsdale, AZ*

- Collaborated with Internal Wholesaler, Business Development representatives, and Field Wholesalers to market share
- Built strong relationships through mix of in-person visits, client entertainment, targeted emails, and web-based meetings