**Jason F Vos CFP®**

936 8th St

West Des Moines, IA, 50265

515-224-0596

jasonvos@johnbadger.com

**QUALIFICATIONS PROFILE**

* Comprehensive knowledge of and experience in leveraging numerous financial tools and instruments in a variety of complex scenarios.
* Proven leadership and team-building skills, coupled with the ability to direct strong teams in managing client relationships and providing financial solutions.
* Relationship-development expertise that complements the ability to aggressively build solid client base and drive revenue growth.
* Skilled at consulting with clients to delineate, analyze their financial situations, and develop strategic solutions to further their financial goals.

**PROFESSIONAL EXPERIENCE**

**CHARTERED FINANCIAL SERVICES, LTD., West Des Moines, IA**

Financial Advisor August 2010 - Present

* Analyze financial information obtained from clients to determine strategies for meeting clients' financial objectives.
* Interpreted data on price, yield, stability, future investment-risk trends, economic influences and other factors affecting investment programs.
* Recommend strategies clients can use to achieve their financial goals and objectives, including specific recommendations in such areas as cash management, insurance coverage, and investment planning.

**WADDELL & REED, Scottsdale, AZ**

Financial Advisor July 2007 - July 2010

**EDUCATION**

**Iowa State University, Ames, IA**

*History Secondary Education, Minor in Economics, Nov 2002* GPA: 3.39/4.00

* Alpha Zeta Honorary Fraternity
* FarmHouse Fraternity Member
* J C Holbert Scholarship Recipient
* Kappa Delta Phi Honorary Fraternity
* Omicron Delta Epsilon Honorary Fraternity

**CREDENTIALS AND LICENSES**

* CERTIFIED FINANCIAL PLANNER™ (CFP®)
* FINRA Series 6, 7, 65, 66
* Life, Health, Disability, Long Term Care, Crop Insurance License
* Retirement Plan Advisory Group Member
* Waddell & Reed Gold and Silver Superstarter Award Recipient

**COMMUNITY INVOLVEMENT**

* Active Member of Lutheran Church of Hope
* Assistant Varsity Football Coach at Collins-Maxwell-Baxter
* Sertoma Club of Des Moines: President: July 2013 - Present / Vice President: July 2012 - June 2013

*References Available Upon Request*