

Kendra Lee Erkamaa

Triangle Financial Services

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A passionate financial services professional and energetic business owner who chooses authentic courage, connection and compassion to be a change agent for those she serves and for abundance in the world.

Triangle Financial Services, Des Moines, IA (2004 to present)

CEO/CFO/Financial Advisor (2007 to present)

- **Financial advisor** – Develop, implement and review personalized financial plans with clients and prospects based on needs, goals and investment capabilities
- **HR manager and staff development officer** – Hire and supervise staff; identify areas of training needs; and create, implement and evaluate training designed to meet staff needs
- **Sales manager** – Track and monitor sales activities; provide consultation and resources for staff to reach target goals
- **Marketing manager** – Identify target markets, oversee promotional communication and company events
- **Operations manager** – Provide oversight on investment paperwork and process; review and evaluate portfolio models, investment research, industry developments, digital software; oversee employees with regular reviews, weekly meetings
- **Community engagement champion** – Provide financial literacy instruction to local groups and classes; endorse/coordinate staff outreach opportunities

Paraplanner/Junior Advisor (2004–2007)

- **Investment research** – Analyzed and selected appropriate investment products for alignment with clients' goals and risk tolerance levels; examined fee structures, risks, management, longevity, returns, etc.
- **Financial plan development** – Developed customized plans that addressed each client's needs to make informed decisions about their investments
- **Technology development** – Transitioned company to a technology driven-office
- **Office manager** – Created workflow process, followed up to ensure consistent execution of processes

ARAMARK, Des Moines, IA (2002 to 2004)

Catering Manager, Food Service Division (Assigned to Principal Financial Group)

- **Staff development** – Trained and supervised staff of six
- **Operations/process management** – Managed execution of 20 to 30 on-location catering events per day

Top Achievements

- Leading through the challenge of purchasing a highly valued financial planning business in 2007, months before giving birth and then experiencing the market crash of 2008, the deepest in more than 70 years
- Achieving Harbour Investment's Captain's Club status in the first and second year of business ownership
- Growing business to more than 100% of what it was in 2007 after being down an additional 20 percent in 2009.
- Expand company with two associated advisors in 2017

Credentials

- Fully licensed in life, health and long-term care insurance since 2006
- Licensed in securities in 18 states: IA, AZ, CA, CO, CT, FL, HI, IL, KS, MN, MO, NC, ND, NE, NY, TX, WA, WI
- Certified Divorce Financial Analyst (CDFA)

Awards

- Captain's Club Status, Harbour Investments, Inc. – Top 40 representatives nationwide (2007, 2008, 2016, 2017, 2018)
- Woman Business Owner of the Year, Greater Des Moines Noon Chapter of American Business Women's Association/ABWA (2007)
- Top Ten Candidate, Greater Des Moines Noon Chapter of American Business Women's Association/ABWA

Education

- Iowa State University, College of Business, B.S. degree, with Spanish minor, honors (2002)
- Small Business Administration, Emerging 200 Initiative, graduate (2011)

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Volunteer

Financial Literacy/Entrepreneurship Educator

- Presenter on business women finding their full potential at National Agent Summit of Farmers Hail Insurance (2018)
- Instructor with Community Educators continuing education courses for insurance professionals and CFPs (2011 to present)
- Presenter at Smart Money Week, Des Moines, on investments, detailing REITs, ETFs, EIAs (2010 to present)
- Presenter at Drake University for CLE and CDFA hours for attorneys (2017 to present)
- Presenter to Girl Scouts of Greater Iowa to help girls achieve badges in financial literacy and entrepreneurship (2010 to present)
- SHE Matters report presenter at statewide conference of Business and Professional Women Iowa (2016)
- Presenter on smoother transition planning (long term care and end of life) at Wells Fargo (2015)

National Association of Women Business Owners, Iowa Chapter (NAWBO Iowa) (2011 to present)

- Co-president, 2018–present
- Secretary, 2012–2013
- Board member, 2011 to present
- Public Policy Chair, 2011 to 2018

Money Smart Week (2010 to present)

- Board member, 2010 to present
- Scout Night chairperson, 2010–2014

Jumpstart Coalition for Personal Financial Literacy

- Board member, 2016 to present

Beacon of Life (2018 to present)

- Budgeting counselor

Zenith Chamber Orchestra

- Board member, 2018 to present

Iowa Supreme Court Judicial Board, Grievance Committee (2017 to present)

American Business Women's Association (2004–2008)

- Fundraising Chair (2006–2007)

Also active as a troop leader for Girl Scouts of Greater Iowa and as a volunteer with Hanawalt School PTA

References available upon request



- Married, 2004, to Matt Erkamaa; daughters Anja and Evi
- Personal maxim: Be the change you wish to see in the world.
- Interests: Biking, camping, hiking, kayaking — anything outdoors!

