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CURRICULUM VITAE

Education
University of Phoenix, Phoenix, AZ
Masters of Business Administration in Accounting, 2003

Arizona State University, Tempe, AZ
Bachelors Degree in Accountancy, 2004

Designations/Licenses
Certified Divorce Financial Analyst, 2011

Certified Financial Planner™, 2006

Certified Public Accountant, 2000

Series 7, 24, and 66 Securities Licensed, 2006

Licensed Real Estate Agent, 2006

Life/Health Insurance License, 2006

Property Casualty Insurance License, 2007

Employment

Prism Financial Concepts, PC, Scottsdale, AZ Managing Partner	March 2008 – Present
Lloyd Financial Services, PLLC, Scottsdale, AZ Managing Partner	August 2000 – March 2008
Del Webb Corporation, Phoenix, AZ Controller of Phoenix Metro Division	December 1998 – August 2000
Hunt Construction Group, Phoenix, AZ Project Accountant	June 1989 - December 1998

Experience
More than 20 years of experience in financial services field with expertise in financial issues of divorce, financial planning, tax planning, investment management, risk management, and retirement planning. Expertise includes:

- Independent Financial Planner and CPA who acts as a personal CFO for individuals, business owners and families with emerging wealth.
- Consulting work assisting clients and their attorneys in understanding the financial implication of various divorce settlement options.
- Provide comprehensive financial services including but not limited to: financial planning, tax planning, investment management, risk management, and real estate consulting services to individuals and business owners.
- Guest speaker and lecturer at numerous local conferences. Topics include: Impact of Real Estate Market on Clients Financial Health, Tax Implications of Short Sale/Foreclosure of Real Property, The Need for Estate Planning for Special Needs Beneficiaries, and various Financial Planning, Retirement Income Planning, Tax Planning, Investment Management, and Divorce related topics.

Professional Memberships
- Certified Financial Planning Board (CFP®)
- Institute for Divorce Financial Analysts (IDFA)
- American Institute of Certified Public Accountants (AICPA)
- Financial Planning Association (FPA)
- National Association of Realtors (NAR)
- Phoenix Association of Realtors (PAR)