**Nathan H. Taccini**

Newport Beach, CA 92660 • (310) 508-8540 • ntaccini@yahoo.com

**Education**

**California Polytechnic State University at San Luis Obispo Bachelor of Science in Business Finance**

**Advanced Coursework:** Futures and Options, Corporate Finance, Securities and Portfolio Management, International Finance, Real Estate Finance, Accounting Information Systems

**Licenses and Registrations**: CFA Level 1 exam completed. Life, Health, and accident.

**Work Experience**

**LSA Financial: Financial Advisor** (September 2013 – Present)

* Extensive Sales Experience: Developed Sales process for gaining Health Insurance clients
* Retirement and investment planning
* Managing a small team of interns to prospect for clients
* Tax preparation; passed CTEC exams
* Annuity planning
* Health Insurance Sales for Small Companies through Covered California
* Insurance License Number 0I22394

**Diverse Financial: Financial Advisor** *(*April 2013 – September 2013)

* Extensive sales experience
* Cold calls and prospecting
* Develop marketing plans
* Develop and maintain relationships with clients
* Active recruitment of more clients through company provided leads and through personal networks
* Life, health, and accident insurance license
* Represent investments in life insurance contracts, equities, and real estate

**BMA Securities: Compliance Office (**January 2013 – March 2013)

* Worked in the compliance department of a broker dealer of over-the-counter securities
* Prepared Compliance packages for review by FINRA
* File Archiving and account consolidation.

**College Works Painting:** **Branch Manager** (March 2010 – September 2010)

* Managed 6 painters, comprising three separate work crews
* Door-to-door sales and cold calling
* Formulated and executed marketing plan
* Hired and terminated employees
* Employee training
* Payroll processing
* Risk and profit analysis
* $50,000 in sales