**Jason Whitlock**

(682) 465-0215 | whitlockj85@gmail.com | Tampa, FL 33604

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| **Professional Summary** |

Dedicated professional with demonstrated strengths in customer service, time management and trend tracking. Good at troubleshooting problems and building successful solutions. Excellent verbal and written communicator with strong background cultivating positive relationships and exceeding goals.

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| **Skills** |

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| * Database Management | * Code Development | * Design and development |
| * Object-Oriented Programming | * API design | * Software Development Lifecycle |

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| **Experience** |

Senior Client Experience Advisor

Smartasset, 2022 - 2023

* Accelerated RIA partnerships and streamlined sales funnel management through expert lead qualification, significantly contributing to strategy development for financial advisory services.
* Spearheaded a team to achieve an 83% conversion success rate, resulting in a net growth of $5M in under three months, demonstrating a profound capacity for orchestrating high-impact strategies and fostering robust growth.
* Initiated and led cross-functional workshops to refine lead qualification processes, enhancing team skills in identifying high-potential opportunities. This proactive education and alignment effort further propelled the efficiency of our sales funnel management, magnifying the team's effectiveness and directly contributing to the accelerated achievement of strategic objectives.

VP of Sales and Business Development

Severin Investments, 2022 - 2022

* Collaborated closely with the sales team to devise and implement targeted marketing strategies, aiming to engage potential clients effectively. This coordinated effort resulted in a substantial increase in net new assets, with a growth of $56M in a single quarter, showcasing the successful integration of strategic planning and teamwork to drive financial growth and expand client base.
* Innovated and executed a series of data-driven marketing campaigns, leveraging analytics to refine targeting and messaging. This approach not only complemented the existing strategies but also further optimized client engagement, contributing to an enhanced market presence and reinforcing the company's competitive edge in attracting high-value prospects.

Lead Investment Counselor

Fisher Investments, 2019 - 2022

* Analyzed and assessed compatible investment opportunities through rigorous investigation and comparative analysis, leading to optimized portfolio recommendations. This strategic approach significantly enhanced client satisfaction, achieving a firm-leading 98% retention rate and fostering a 15% year-over-year growth in net new assets.
* Awarded the Platinum Achiever title for 2020, 2021, and 2022 at Fisher Investments, recognizing sustained excellence in financial advisory and client management.

Senior Wealth Advisor

JP Morgan Wealth Management, 2017 - 2018

* Orchestrated and streamlined collaboration between divisions by integrating private wealth management services with retail banking operations, effectively broadening service offerings.
* Leveraged and expanded a robust professional network both internally and externally, driving substantial business growth. This strategic initiative led to a remarkable net new asset growth exceeding 25% year-over-year.
* Recognized as a National Achiever in 2008, 2010, 2011, and 2017 for ranking in the top 10% of performance metrics at JP Morgan, showcasing exceptional leadership and an unparalleled commitment to driving financial success.

Financial Advisor

Merrill Lynch, Pierce, Fenner & Smith, 2013 - 2016

* Mastered and surpassed objectives in a 36-month advisor development program, rapidly sourcing and amassing over $45 Million in assets within just 24 months.
* Appointed to helm the PMD program, mentoring incoming advisors and spearheading initiatives that elevated the advisor completion rate to an impressive 90%, significantly bolstering advisor retention and minimizing employee turnover.
* Honored with the "30 under 30" accolade by the Fort Worth Business Press in 2010 and distinguished as part of Merrill Lynch's President's Club in 2013 and 2014, recognizing exceptional talent and contributions to the field.

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| **Education** |

Software Engineering Certification: Full-Stack Development & Computer Science

AppAcademy, Mar 2024

CFP & CDP Certifications: Financial Planning & Economics

College for Financial Planning, Denver, CO, Jul 2014