



# 10 Things You Didn't Know About Brendan O'Donnell

- 1** Brendan previously worked for the 2nd largest distributor of US financial products for 13 years. During that time, he grew a book of business from 2 financial service professionals to 582 financial service professionals!
- 2** Under Brendan's leadership, his financial service professionals provided over \$470 million in financial services to their clients.
- 3** Brendan started his career at Putnam Investments. At the height of the 2008 Global Financial Crisis, and in less than 3 years, he procured over \$90 million in new assets.
- 4** He has been happily married to his wife, Rachael, for 7 years. They share a healthy, active, fun-loving 4-year-old son, Alex. They live in the suburbs of Raleigh, North Carolina.
- 5** Brendan's grandfather was Chief Counsel on the Senate Permanent Subcommittee of Investigations on Organized Crime. He replaced Sen. Robert F. Kennedy.
- 6** Brendan played for 3 different sports teams in high school. As captain of the tennis team, he led his school to win the New Hampshire state championship.
- 7** He graduated Plymouth State University with a degree in Business Management. Brendan followed in the footsteps of his father, who not only graduated from PSU, but also was chosen "Mr. Plymouth State University" by the school newspaper.
- 8** Brendan coaches soccer every week during soccer season for his local youth league.
- 9** He has spoken to thousands of financial advisors at public events about strategies for maximizing tax-free pensions for clients.
- 10** In his spare time, Brendan loves to boat, tube, jet ski, and hike.

## Offices By Appointment

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