

Heather Conklin, CFP

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I am a web-stack developer who enjoys figuring out the most efficient way to solve problems, analyze data and present information. After nearly 20 years in the financial industry, I decided to focus my talents on the area I am most passionate about: building things that improve people's lives. I've always been a maker and now, as a developer, I create virtual objects that inform, engage and empower others.

SKILLS

- ◆ Ruby
- ◆ Ruby on Rails
- ◆ JavaScript
- ◆ jQuery
- ◆ HTML
- ◆ CSS
- ◆ solving problems
- ◆ breaking down complex ideas into manageable pieces
- ◆ creating customized solutions from preliminary plans
- ◆ working efficiently with people of diverse backgrounds and skill levels
- ◆ interviewing clients to understand their financial fears, objectives and priorities
- ◆ gathering information about clients' cash flow, identifying where they've been fooling themselves and discussing ways to use current cash flow to reach their goals
- ◆ analyzing investment portfolios to determine their diversification, costs and risk level
- ◆ reviewing and summarizing estate planning documents in order to discuss their terms with clients
- ◆ evaluating clients' insurance needs, reviewing their existing coverage to identify further needs

RECENT PROJECT

Good Day Mate gdm2.herokuapp.com

Capstone project at DevBootcamp. In eight days, our four-person team produced a mobile-first app using React.js. Our goal was to create a way to reflect on the day just finished, express gratitude and anticipate good things for the following day. Users set up a stream of things to see/do to begin their day. In the morning, they review their entries of the previous night and dive into the customized stream they had created, maybe reading headlines, listening to a podcast or seeing a truly terrible geeky joke. Best viewed on mobile devices.

EXPERIENCE

Dev Bootcamp *Graduate 2015-2016*

- ◆ Intensive training in Ruby, Javascript, Ruby on Rails, jQuery, HTML, CSS.
- ◆ Object-oriented programming, front- and back-end web development.

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Mercer Advisors

Financial Advisor 2005-2015
Branch Manager 2010-2014

- ◆ Managed the Chicago Branch and team of four. Together we maintained relationships with over 300 clients and assets of approximately \$300 million.
- ◆ Created comprehensive financial plans for individuals and families. Maintained and updated plans over time.
- ◆ Modeled potential financial impact of major (and minor) life decisions.
- ◆ Analyzed small businesses to determine the type of retirement plan that best suited the owners' needs and staff demographics.
- ◆ Co-created and ran periodic meetings of women clients and their invitees to discuss basics of financial planning such as managing cash flow, investments and estate planning.

StrategicPoint Investment Advisors

Financial Advisor 2001-2005

- ◆ Managed the retirement plan division, reviewing the needs of business owners to determine the most efficient type of plan.
- ◆ Conducted weekly office hours on-site for our largest client to talk with any of their 400+ employees about their 401(k) and financial planning topics.

Mercer Advisors

Associate Advisor 1999-2001
Financial Associate 1997-1999
Financial Administrator 1995-1997

- ◆ Studied investments, client suitability and state and federal laws pertaining to recommending and selling securities. Obtained series 63, 65 and 7 licenses.
- ◆ Learned the trade of financial planning from the ground up. Worked closely with a senior financial planner who mentored me through my first several years in the industry.

EDUCATION

Rutgers University 1993

BA in Linguistics