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# Korey Cheshire

## Financial Advisor

200 2nd Ave W  
Seattle, WA 98119  
(541) 914-7458  
korey.cheshire@gmail.com

## SKILLS

Client relations, investment strategies, customer service, product knowledge, self motivated, goal driven, Microsoft Suite, Salesforce. Series 7 & 66 securities licenses. Life insurance license. Securities licensed in 25 states including OR & WA.

## EXPERIENCE

### **Oregon Community Credit Union, Eugene, OR** - *Financial Advisor*

FEBRUARY 2016 - PRESENT

- Work with a team of advisors and administrators to assist clients in meeting personal and financial goals.
- Manage a book of over \$200,000,000 in assets. Portfolio analysis, annuity and insurance sales, financial planning.
- Contribute towards broad goals determined by the financial institution.

### **Northwestern Mutual, Eugene, OR** - *Financial Representative Intern*

MARCH 2015 - FEBRUARY 2016

- Met with clients to determine products that meet their specific needs. Sold short and long term life, disability, and long term care insurance.
- Qualified nationally as a top Northwestern Mutual intern based on exceeding production goals.

### **Pentagon Federal Credit Union, Eugene, OR** - *Senior Member Services Representative*

FEBRUARY 2012 - MARCH 2015

- Managed a team of 20 member service representatives.
- Established sales and services goals.
- Provided member service to the credit union members around the globe.

## EDUCATION

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**University of Oregon, Eugene, OR** - *Bachelor of Science*

September 2013 - June 2016

Major- Economics. GPA-3.5

**Lane Community College, Eugene, OR** - *AAOT*

September 2009 - June 2013

**Coding Bootcamp - Full Stack** - *University of Washington*

July 2021 - present

**VOLUNTEER WORK**

Debris clearing at the Cascade Raptor Center, volunteer native tree planting along the Willamette River.