

Alec Quaid

9075 S Yosemite St #504 Lone Tree, CO 80124
aquaid10@gmail.com • 970-232-5422

EDUCATION

Colorado State University, Fort Collins, CO

Concentration: Financial Planning, CFP® Board Registered Program

August 2015 – May 2017

Northwestern College, Orange City, IA

Concentration: Finance

Activities: Basketball Player

August 2013 - May 2015

SUMMARY

Passionate about delivering trusted advice and education to the marketplace and serving people through the platform of financial planning. Excels at building meaningful client relationships and communicating effectively. Competent in creating thoughtful and strategic financial plans and committed to a career as a financial advisor.

EXPERIENCE

Associate Advisor

American Portfolios, Denver, CO

Mar 2019-Present

- Serve other's by providing education to empower them to make great decisions for their future
- Analyze fact patterns and build financial plans to deliver solutions to individuals and families

Financial Advisor

Northwestern Mutual, Denver, CO

June 2017-Mar 2019

- Cultivate relationships to assist people in accomplishing their financial goals

PROFESSIONAL DEVELOPMENT

- CFP® Candidate
- Licenses: Series 7, 6, 65 & 63
- Life & Health Insurance License

COMMUNITY INVOLVEMENT

Aurora Chamber of Commerce

Young Professional Executive Committee

Jan 2020 - Present

Financial Planning Association

Partnership Committee

Jul 2019 - Present

Team Leader

LifeGate Church

Mar 2020 - Present

CityYear Denver

Mentor

Jul 2018 – Jul 2019

Basketball Coach

Elevation Flyers

Oct 2019 – Apr 2021