

MARYJEANNE M. SANDUSKY, CFP®

741 Young Ct.
Galt, CA 95632
(925) 899-0876
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SUMMARY

I would like to apply my Financial Advisory background in support of advisors and clients of a highly-regarded company on a part-time basis.

PROFESSIONAL:

- Certified Financial Planner™ Designation
- Member, Financial Planning Association (FPA)
- Passed the national CPA exam, 1998
- Candidate, CTEC Certification

EDUCATION:

- Heald Business College, A.A., Accounting **(4.0 GPA)**
- San Jose State University, B.A., French
- International Programs, Aix-en-Provence, France

EXPERIENCE:

FINANCIAL SERVICES:

As a Financial Advisor, I assisted families with articulating and quantifying their goals. Through comprehensive financial planning, I help them implement strategies for their retirement, education, protection, investment, tax, and estate planning. I have utilized MoneyGuide Pro, Naviplan, and Ameriprise proprietary planning software. In addition, I have experience with Salesforce CRM, Orion, and the Microsoft Office Suite. 1999 – July 2017

I have served in this field as an employee advisor, as an independent representative, and in support of other practices. My professional relationships included those with:

- **Destination Wealth Management
Walnut Creek, CA**
- **CUNA Mutual Group (at Metro 1
Credit Union)
Concord, CA**
- **SGC Financial
San Mateo, CA**

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- **Compass Ion Advisors**
Conshohocken, PA
- **Faith Financial Planners**
Franklin, TN (worked from home in CA)
- **American Express/Ameriprise Financial**
Walnut Creek, CA

COMMUNITY:

- Church Coordinator, Crown Financial Ministries
- Volunteer, FPA, Homes for Heroes and Financial Planning Day-Oakland
- Volunteer tutor, CAHSEE exam prep
- Volunteer, City Teams, Chester, PA