Scott T. Spilker, CFP®

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Summary

Financial industry professional with experience identifying problems, creating concrete solutions for resolution, and implementing technologies to meet organizational needs. Leader, both in the community and workplace, who is not content observing others, but would rather engage in the problem-solving process.

Career Experience

ASSET PLANNING & MANAGEMENT, INC.
Spokane, WA

Financial Planner Associate
Sep. 2011 – Present

Staff Analyst
Jan. 2009 – Sep. 2011

Intern
Summer 2008

Financial planning and investment responsibilities:
Responsible for all areas of the comprehensive financial planning process: conducting client interviews, collecting data, developing recommendations and presenting plans to clients. Comprehensive financial plans include analysis of cash flow, insurance, investments, taxation and estate planning segments of the client's complete financial picture.

Investment management duties include a seat on the investment policy committee overseeing client assets, and analyzing investment opportunities for client portfolios. This includes evaluation of independent analytical research reports, company financial statements, and prospectuses for investment suitability.

Technical responsibilities:
Recommend, develop and implement technologies to increase productivity and efficiency in all areas of business operations.

Develop financial planning models including cash flow projections, debt payoff calculators, estimations for tax consequences, preparation of personal financial statements, and portfolio growth and depletion projections.

Facilitate movement from local to hosted and cloud technology services reducing labor intensive operations and allowing employees to focus on revenue generating tasks. Implemented technologies include Advent Portfolio Exchange OnDemand℠, Fidelity WealthCentral, and Oracle® OnDemand. Also act as company liaison to technology consulting firm.

WASHINGTON STATE UNIVERSITY
Pullman, WA

Information Technology Assistant
Winter 2005- Winter 2008

Technical responsibilities:
Acted as a collaborative member of an instructional design team. Implemented online deliverables for distance education courses using Microsoft Office and web design tools using ASP programming principles. Researched emerging technologies and critically analyzed the future value of each technology. Examined the potential of using virtual worlds in an online education format.

Education and Certifications

CFP® Certification Program	**Professional Education Program** College for Financial Planning, Greenwood Village, CO Completed: April 2011
Bachelor of Arts in Business Administration	**Double major: Finance & Accounting** Washington State University, Pullman, WA December 2008

Technical Experience

Financial

Advent Axys
Advent Portfolio Exchange OnDemand℠
Fidelity WealthCentral
Morningstar Advisor Workstation
Morningstar Principia
Valueline Investment Analyzer

Office

Microsoft Office including extensive use of:
- Access
- Excel
- PowerPoint
- Word

Microsoft SharePoint
Oracle® CRM On Demand

Web Design

Adobe Dreamweaver
Microsoft Expressions
HTML & CSS

Learning:
JavaScript
PHP

Memberships and Service

Boards, chairs & memberships

Financial Planning Association, Spokane, WA Chapter – Technology chair
Spokane Estate Planning Council - member
Washington State University Alumni Association – member

Civic leadership

Rotaract Club of Spokane – Board member, Social chair
Spokane Jr. Lilac Parade – Logistics chair

Panelist

2011 Finance Industry Night – Washington State University College of Business
2011 Insurance Industry Night – Washington State University College of Business