Michael Kelley II, CFP, CLU

Financial Advisor

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A results-oriented Financial Advisor with vast experience and a unique blend of analytical, strategic, and problem-solving skills. Proficient at developing client's plans to support their financial future and providing guidance on their retirement, estate planning, taxes, investments, and insurance decisions. Adept at building flexible portfolios and leading the execution of projects. Excellent communicator with the innate ability to align recommendations with strategic business objectives and report progress to executive committees and leadership teams.

Areas of Expertise include:

- Financial Planning
- Project Management
- Building Portfolios
- Strategic Analysis
- Client Relationships
- Market Trends Assessment
- Investment Strategies
- Team Leading
- Interpersonal Skills

Professional Experience

CARVER FINANCIAL SERVICES • Mentor, OH • 3/2014 to Present

Financial Advisor

Collaborate with advisors on structuring flexible portfolios involving multiple asset allocation strategies and a combination of equity, bonds, cash, alternative investments, and insurance-based product vehicles specific to the clientele's short-, intermediate-, and long-term goals. Perform basic analysis contrasting various company platforms and investment product vehicles utilizing spreadsheets and graphs. Monitor financial market trends, prepare information, and facilitate department and client meetings.

Key Accomplishments:

- Appointed Investment Committee Lead, analyzing investments via MPI and Morningstar.
- Recognized for building strong client relationships, providing explicit explanations of various investments.
- Led the rollover of landline phones to virtual software and the paperless project.
- Conduct various financial presentations to 300+ attorneys and CPAs.
- Created and implemented new processes and procedures, streamlining workflows and improving efficiencies.

VALMARK SECURITIES • Akron, OH • 11/2012 to 3/2014

Insurance Associate

Supported high-level insurance agents with product evaluations, selections, and plan building. Network with large insurance companies to discuss products and potential partnerships.

Key Accomplishments:

- Designed multiple evaluation studies, securing the highest quality materials and products.
- Key player in coordinating a $30M+ insurance premium.

AXA ADVISORS • Akron, OH • 5/2012 to 1/2013

Independent Broker

Delivered innovation strategies to help clients drive and preserve capital. Trained on various investment topics, including relationship building, client tax reduction liability strategies and retirement and legacy planning.

Education & Training

Bachelor of Science in Business Administration, Finance
UNIVERSITY OF AKRON | Akron, OH | 2013

Certified Financial Planner (CFP) / Chartered Life Underwriter (CLU)
Series 7, 24, 63, 65 / Accident & Health, Life & Long-Term Care Insurance