
BRITTANY WIRTZ

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PROFILE

Talented and results-driven entrepreneur with a proven track record of successfully developing and growing two businesses. Recently led a successful, yet stagnant financial practice in its 35th year of operation to a production increase of 75.7% and a net profit increase of 40%, compared to a 9% increase the previous year. A hard worker and quick learner who has consistently succeeded within complex, fast-paced environments requiring leadership, resourcefulness, creativity, strong communication and people skills, advanced problem solving, and an ability to remain focused and flexible.

PROFESSIONAL EXPERIENCE

Investment Advisor | Financial Decisions Group

Waterloo, IA | July 2014 – November 2016

Self-employed financial advisor who operated within a team environment for a private firm. Responsibilities included identifying business opportunities, networking, conducting client meetings, creating action plans, managing workflow, and improving current business models in order to achieve growth and better serve client needs.

- Certified Investment Advisor and junior partner within a practice containing \$20,000,000 in assets under management; 300+ clients, and 35 years of operation.
- Successfully grew an established business to a production increase of 75.7% from 2014 to 2015 compared to a 3.6% average growth rate the previous 5 years.
- Awarded "Rookie of the Year" by Transamerica, an award given to only 3 high performing candidates nationwide.
- Established rapport and developed strong relationships built on trust and integrity with clientele, business owners, and key people of influence within the community.
- Managed workflow, prioritized and delegated duties each week, oversaw progress, and set deadlines to ensure all projects were completed in a timely and effective manner.
- Streamlined operations and increased productivity by establishing defined roles and responsibilities, developing a client service model, and standardizing internal workflow processes.
- Developed, presented, and reviewed goals and action plans on a monthly, quarterly and annual basis. Created and implemented systems to track progress and enhance accountability.
- Motivated and encouraged team members, offered guidance, and consistently possessed a positive "can-do" attitude.
- Developed and implemented strategies for individual portfolios averaging above \$1,000,000 and consistently devised solutions for multiple accounts each week averaging \$100,000+ in value.
- Identified as the "go-to" resource for clientele as well as peers seeking advice due to an ability to relate well to others, strong problem solving skills, and an aptitude for taking complex information and articulating it in a way that's easy to understand.
- Conducted annual reviews with current clients to provide education on portfolios, specific holdings, and market trends. Provided advice and guidance to ensure the client's financial goals were continually being met.
- Created and presented complex financial plans to clients utilizing financial software. Instituted financial software into the business model, resulting in increased client understanding, improved forecasting and increased sales.

Online Marketing Intern | BraceAbility

Cedar Falls, IA | May 2013 – July 2014

Acquired advanced online marketing skills from a direct-to-consumer online retailer of orthopedic braces. One of seven employees within a startup Ecommerce company responsible for marketing, selling and distributing products to consumers worldwide.

- Utilized Google Analytics and Google Keywords to determine optimal naming, branding and pricing of 2,000+ products. Results increased marketability, website traffic, and revenue.
- Successfully performed research and analysis to identify consumer needs in order to optimize each product.
- Analyzed competitor branding and pricing techniques to ensure BraceAbility's products remained competitive.
- Implemented keyword strategies resulting in a 100% increase in sales within the first 3 months.
- Self-managed workflow in an atmosphere with significant autonomy.

Marketing Intern | FrankCrum

Clearwater, FL | May 2012 – August 2012

Designed weekly marketing pieces and written communication for approximately 220 employees and 220,000 contracted employees of a Professional Employment Organization.

- Designed 14 informational pieces utilizing Adobe Illustrator for 500 company brokers nationwide to market services to current and potential clientele.
- Developed a company social media platform and updated it regularly with intriguing, yet relevant content designed to connect with target audience. These efforts increased Facebook engagement by 50% in 3 months.
- Researched relevant topics and content in order to write 2-3 blogs each week for staffing and PEO divisions and provided content for press releases.
- Took initiative to research, develop, and implement solutions to real-time issues regarding the creation of marketing pieces when management was not available. Consistently delivered products that exceeded expectations and required no further changes.

EDUCATION

University of Northern Iowa
Bachelor of Arts
Marketing, Sales Emphasis

CERTIFICATIONS

Investment Advisor Representative
FINRA Series 7
FINRA Series 63
FINRA Series 65
Iowa Life Insurance License
Iowa Health Insurance License

ORGANIZATIONS

NAIFA (National Association of Insurance and Financial Advisors)
Greater Cedar Valley Alliance & Chamber
Cedar Valley Jaycees
Cedar Valley Young Professionals
