

Jason D. Tanz

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PROFESSIONAL EXPERIENCE

Registered Client Service Associate, in charge of entering trades, producing retirement analysis reports, and assisting the C Suite team at Phillips and Company, LLC., Portland Oregon, July 2022 – January 2024. Worked alongside the CFO and Vice President James Smith in data acquisition, data aggregation, and client service inquiries; as well as assisted the CEO and President Tim Phillips on personal and client items for the High net-worth client group.

Registered Paraplanner, in charge of investment research, meeting preparation, and processing client trade; along with assisting in writing financial plans, general office management, and investment operations at Lyman and Associates a Private Wealth Advisory Practice of Ameriprise Financial, LLC., Portland Oregon, May 2021 – March 2022.

Investment Operations Assistant, in charge of processing financial recommendations and paperwork, at Clear Financial Partners, Lake Oswego Oregon, July 2020 - February 2021.

Financial Representative and Insurance Producer at Northwestern Mutual, Lake Oswego Oregon, February 2020 - July 2020.

PROFESSIONAL CERTIFICATIONS

FINRA Series 66 (Uniform Combined State Law Examination), Obtained in March 2022
FINRA Series 7 (General Securities Registered Representative), Obtained in November 2021 Series
Industry Essentials (SIE), Obtained in July 2020
Life and Health Insurance Producer License, Obtained in February 2020

SKILLS

Proficient in Microsoft Office; including but not limited to Microsoft Word, PowerPoint presentation creation, and Excel workbook construction and formula coding.

Experience in Financial modeling with Income Solver, and Investment data aggregation with SS&C Black Diamond
Working knowledge of Adobe Acrobat Pro, Adobe Premiere, and WordPress

An understanding of Stata and its use in Economic Analysis

Proficient in web development using 1Wordpress, HTML, and CSS coding Link
to personal site: <http://jasontanz.com/>

EDUCATION

Mathematical Economics, BS with a minor in Business Administration, June 2019 Oregon State University, Corvallis, Oregon

Intern at www.halftheclothes.com, online entrepreneurship, and web development company, Corvallis Oregon, June - September 2018.

Mathematics Tutor, MTH 111 and 112, Oregon State University, Corvallis Oregon September 2015 - December 2015.

ACADEMIC PROJECTS

Economics of the NBA and how college education affects player Salary, "*Brain vs Bron; an economic study on college education and NBA salary*", Jason Tanz ECON 428, undergraduate dissertation.

HONORS / AWARDS

Finalist in Oregon State University Entrepreneurship Contest, 2018 Invited to
OSU Launch Academy for Web Development Skills, 2018

VOLUNTEERING / AFFILIATIONS

Oregon State Economic Club, 2017 - 2019

Samaritan Hospital, Lebanon Oregon, June 2016 - October 2016

FreeGeek, Construct computers and learning Linux, Portland Oregon, 2011 - 2014