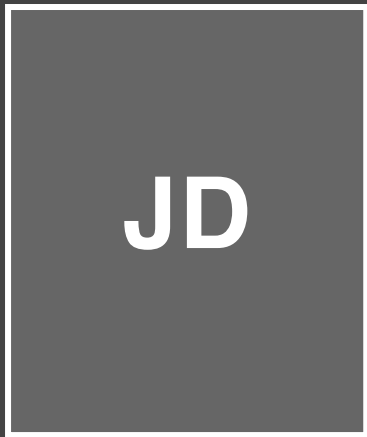




Jennifer Davis

Financial Advisor

Advisor holding the Certified Financial Planner credential, managing \$87M in client assets across 142 households, focused on business owners and pre-retirees. Build financial plans covering retirement income, tax planning, and estate transfer, and coordinate with tax preparers and estate attorneys on complex cases.

CONTACT INFORMATION



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EDUCATION

- B.S., FINANCE, UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL, 2016
- CERTIFIED FINANCIAL PLANNER (CFP), 2021
- FINRA SERIES 7 AND SERIES 66

KEY SKILLS

- Retirement income planning
- Roth conversion analysis
- Estate and trust coordination
- Tax-loss harvesting
- MoneyGuidePro
- eMoney
- Riskalyze
- Redtail CRM
- Schwab and Fidelity custodial platforms
- Client review meeting facilitation

PROFESSIONAL EXPERIENCE

FINANCIAL ADVISOR | BLUE RIDGE WEALTH GROUP, CHARLOTTE, NC | 2019 - PRESENT

- Grew personal book from \$34M to \$87M in client assets over five years, adding 61 net new households through client referrals and tax preparer introductions.
- Built retirement income plans for pre-retirees ages 55-67, modeling Social Security claiming strategies, Roth conversion ladders, and healthcare bridge coverage before Medicare eligibility.
- Coordinated with estate attorneys on 18 irrevocable trust fundings, ensuring insurance ownership and beneficiary structures matched the drafted documents.
- Ran quarterly portfolio reviews using Riskalyze and MoneyGuidePro, rebalancing back to target allocations when drift exceeded 5%.
- Passed the Certified Financial Planner exam in 2021 and completed advanced personal financial planning coursework in 2023.

ASSOCIATE FINANCIAL ADVISOR | BLUE RIDGE WEALTH GROUP, CHARLOTTE, NC | 2016 - 2019

- Supported two senior advisors on a combined \$210M book, preparing meeting materials, running plan updates, and handling all money movement paperwork.
- Onboarded 40-50 new client households per year, opening accounts across Schwab and Fidelity custodial platforms and reconciling incoming account transfers.
- Drafted Investment Policy Statements and one-page plan summaries used in every annual review meeting.
- Studied for and passed the FINRA Series 7 and Series 66 exams while working full time.