

DAN ENOS

Junior Financial Advisor
Spencer Financial, LLC

INSURANCE | INVESTMENTS | RETIREMENT SOLUTIONS

EXPERIENCE

- Prior Experience**
- Fidelity Investments: Financial Representative, 2016-2017
 - Maintained client accounts by executing trade and distribution requests
 - Provided service and resolved complex issues for high net worth individuals
 - Putnam Investments: Investor Service Representative, 2015-2016
 - Processed service items and mutual fund trades per the request of clients and financial advisors
 - Jeanne D'Arc Credit Union: Member Service Representative, 2010-2015
 - Conducted account openings, account maintenance, loan originations, and loan closings
 - Approved consumer loans per company lending guidelines
 - Appointed as Branch IRA Specialist for all IRA account types

LICENSES

- FINRA**
 - Series 7 – General Securities Registered Representative
 - Series 63 – Uniform Securities Agent State Law
 - Series 65 – Uniform Investment Advisor Law
- NAIC-Massachusetts Division Of Insurance**
 - Individual Producer Life Insurance License
 - Individual Producer Accident and Health or Sickness License

MEMBERSHIPS AND INVOLVEMENT

- Volunteer**
 - Boys and Girls Club of Nashua, NH
 - Nashua Police Athletics League
- Community**
 - Umpire for the Massachusetts Baseball Umpire's Association

EDUCATION

Rivier University, B.A., Magna Cum Laude

SPENCER FINANCIAL, LLC

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