

**DESIGNATIONS AND  
EXPERIENCE**

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- Designations** CFP®: CERTIFIED FINANCIAL PLANNER™ professional  
AIF®: Accredited Investment Fiduciary®  
CLTC: Certification in Long Term Care
- Prior Experience** Competition Analyst: John Hancock Life Insurance Co., 2003-2006  
Produced detailed comparative analysis of complex insurance products.  
Trained high-level advisors on the appropriate use of insurance products to solve complex problems for their clients.
- Speaker** National Financial Partners [NFP] Annual Meeting, Chicago, IL  
Addressed top producers on innovative uses of insurance products.  
Signator Investors, Inc. Practice Advancement Conference, Orlando, FL  
Main platform presentation on practice management and client service.

**MEMBERSHIPS AND  
INVOLVEMENT**

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- Member** Boston Estate Planning Council  
National Association of Insurance and Financial Advisors [NAIFA]  
*4 under 40 Award Recipient*  
Million Dollar Round Table [MDRT], Top of the Table  
*Chair of the Pre & Post Retirement Committee*  
*Finance Committee*  
*Chair of the Advanced Planning Task Force*  
Sudbury Chamber of Commerce  
*Distinguish Service Award*
- Charitable** Habitat for Humanity, Fundraising & Construction for Wayland, MA build  
*Copper Hammer Sponsor*  
Seeds of Peace - Sponsored multiple grants from the MDRT Foundation  
Children's Hospital, Boston, MA, Boston Marathon Team "*Miles for Miracles*"
- Community** Trustee, The Sudbury Foundation Board  
Director, Sudbury Youth Lacrosse Board  
Youth Soccer & Lacrosse Coach, Sudbury, MA
- Captain** Colby College [the Mules] Lacrosse Team

**EDUCATION**

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Colby College, B.A., Cum Laude  
Boston University, Certificate in Financial Planning [CFP®]

**SPENCER FINANCIAL, LLC**

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