

## DAN ENOS

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Junior Financial Advisor  
Spencer Financial, LLC

INSURANCE | INVESTMENTS | RETIREMENT SOLUTIONS

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### 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

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### 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

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### MEMBERSHIPS AND INVOLVEMENT

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

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### EDUCATION

Rivier University, B.A., Magna Cum Laude

#### SPENCER FINANCIAL, LLC

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