

Jonathan W. Stroh
5910 Millers Circle SE, Prior Lake, MN 55372
952-807-3306
Stroh068@gmail.com

Objective: To obtain an entry level position at an independent financial planning firm

Education:

University of Minnesota, Duluth, MN

Bachelors of Accounting (GPA 3.0/4)
Double Major in Finance and Accounting
Minor in Financial Planning (All CFP® courses completed)
Licensing: Series 7 & 66

Pertinent classes include:

- Estate Planning
- Risk Management and Insurance
- Individual Taxation
- Advanced Business Taxation
- Financial Markets and Institutions
- Corporate Finance
- Employee Benefit and Retirement Planning
- Investment Fundamentals
- Financial Institutions Management
- Managerial Finance
- Business Communications
- Advanced Business Writing
- Public Speaking
- Macro/Micro Economics
- Economics of Money and Banking

Experience:

Superior Kiteboarding School, LLC, Prior Lake, MN

June 2010 - Present

Owner

Established and built client relationships; Answered customer questions and recommended products; Organized and managed the company's finance, accounting, and tax issues; Created advertising campaigns; Attended product demos; Represented the company at events; Participated in event organization; Taught lessons; Effectively competed online through search engine optimization

Extreme Action Sports, Minnetonka, MN

June 2006 - October 2009

Company Representative/Kiteboarding Instructor

Interacted with clients; Promoted products; Attended product demos overseas; Represented the company at events; Managed the lesson program; Promoted goodwill for the business

Capital Management Associates, Bloomington, MN

August 2005-July 2008

Administrative Assistant

Filled out and submitted client paperwork, Performed research on Morningstar, Used asset allocation applications to prepare reports for client meetings