

Alexis Trauger, CFP®

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Experience

FINANCIAL ADVISOR | MINNEAPOLIS WEALTH ADVISORS | DECEMBER 2015 – PRESENT

- Provide comprehensive personal financial advice to help clients achieve their goals with a focus on high net worth individuals and families
- Conduct detailed analysis in complex client situations to maximize opportunities in planning areas such as executive compensation, tax, retirement, insurance, estate, and education
- Deliver advice and services with excellence to attract client referrals for practice growth
- Collaborate with team of advisors to share knowledge, improve processes and deliverables, and ensure consistent advice is provided to clients across the practice
- Mentor and train new hires in the role of paraplanner and client service coordinator

CLIENT SERVICE COORDINATOR | MINNEAPOLIS WEALTH ADVISORS | JULY 2014 – DECEMBER 2015

- In centralized function, created detailed financial plan deliverables for all clients of the practice
- Analyzed client materials for unique planning opportunities and presented impactful planning strategies to lead advisors
- Overhauled financial planning strategies manual for updates and advances in service delivery

ACTING CONSULAR AFFAIRS OFFICER & ADMINISTRATIVE ASSISTANT | CONSULATE GENERAL OF CANADA | NOVEMBER 2010 – JUNE 2014

- Lead Consular Affairs division in delivering emergency and administrative services to Canadians in the Consulate's jurisdiction
- Responsible for hiring, training and managing Consular affairs assistant
- Coordinated across units with the Consulate on joint projects and events
- Managed the Consular budget, completed annual reconciliation and drafted fiscal year proposal

Education

GRADUATE CERTIFICATE | MAY 2015 | UNIVERSITY OF ST. THOMAS OPUS COLLEGE OF BUSINESS

- Certificate in Financial Planning

BACHELOR OF ARTS | DECEMBER 2009 | UNIVERSITY OF MINNESOTA, TWIN CITIES

- Honors: *summa cum laude*; graduation with distinction; Dean's List 2006 – 2009
- Major: Political Science
- Major: French Studies

Certifications and Licenses

- Certified Financial Planner
- Series 7, Series 66

Insurance: California, District of Columbia, Illinois, Minnesota