Craig McCrory

2517 Northside Drive #1027 ▪ San Diego, CA 92108 ▪ Phone: (480) 363-2727 ▪ Email: craigmccrory@hotmail.com

Career Goals: Portfolio Manager / Asset Allocation / Security Analyst / Financial Planning

Dedicated goal-driven financial professional with 3½ years of experience in financial planning and wealth management for high net worth families. Proficient in financial areas including retirement planning, asset allocation, investment security analysis, cash flow analysis, and insurance planning. Strong PC/spreadsheet skills, effective listener and communicator, with expertise working on projects individually and in a team environment.

Skills Summary

▪ Strategic Planning ▪ Portfolio Assessment ▪ Investment Strategies ▪ Security Analysis	▪ Cash Flow Evaluation ▪ Portfolio Allocation/Rebalancing ▪ Portfolio Accounting & Performance	▪ Protection Planning (Insurance) ▪ Time Management ▪ Attention to Detail ▪ Effective Communication

Professional Experience

HK FINANCIAL, INC. – San Diego, CA **6/2005 to Present**

Private Life Planning & Wealth Management firm aiding 50 families with total assets of approximately $30 million

Planning Assistant

Provide complete back office support for firm. Manage financial planning process for clients by aiding in the design, data input, and analysis of comprehensive financial plan based on client goals and needs. Assist in the development of investment strategies for clients using model portfolios created and monitored within the firm consisting of exchange traded funds and non-traded alternative investments. **Key accomplishments:**

- Improved content and design of comprehensive financial plan delivered to clients by including probability measures for attaining financial goals using Efficient Frontier and Modern Portfolio Theory.
- Enhanced client cash flow analysis to include detailed review of income and expenses.
- Implemented systems & processes within the firm to increase service level to clients and boost productivity. Projects include: Customer Contact Management software system; Portfolio Management software system; created and implemented quarterly advisory fee billing system and process, and paperless office environment.
- Designed investment tracking and monitoring system for non-traded alternative investments.

DUCHARME, MCMILLEN & ASSOCIATES, INC. – Phoenix, AZ **6/2001 to 2/2005**

National Corporate Tax Consulting firm

Staff Consultant II, 7/2002 to 2/2005
Staff Consultant I, 6/2001 to 6/2002

Performed sales and use tax audits for primarily large Fortune 500 companies. **Key accomplishments:**

- Participated in corporate audits saving clients in excess of $1,000,000 in overpaid sales and use taxes.
- Applied working knowledge of corporate tax concepts including general ledger and state & local tax rules and regulations.
- Managed client audits with team of consultants.

Credentials & Education

- FINRA Series 7 & 66
- Life Insurance License (CA)
- Level II Candidate for Chartered Financial Analyst® Program

THE UNIVERSITY OF ARIZONA, Karl Eller School of Business – Tucson, AZ
Bachelor of Science in Business Administration Major: Business Management, 5/2001
Cumulative GPA: 3.42 (Scale: 4.0) Major GPA: 4.0

Advanced Computer Skills

▪ MS Office ▪ Morningstar Advisor Workstation	▪ Junxure-*i* CRM ▪ Sungard AllocationMaster	▪ Pershing NetExchange Pro Trading Platform