

Bryant Slater

### **Objective**

Desires the opportunity to infuse the entrepreneurial spirit, dynamic energy, and sagacity to help plan and lead the next generation to its optimum profit, value, growth, synergism and success. Extensive experience in financial planning, budgeting, control, analysis, and reporting. Creative skills in marketing, sales, new product development, pricing, and customer service. Excellent written and verbal communication skills. Ability to direct, develop, and motivate human resources.

### **Experience**

#### **PRIVATE CONSULTANT 2000 TO PRESENT**

- Specializing in assisting clients with their financial needs. Primary focus is to match clients with potential lenders and provide clients with recommendations to better utilize their money. Has worked as a consultant with Waddell and Reed Financial services, Bank of America, The Acquisition Department of Wells Fargo Bank, Mortgage Store Commercial, and numerous businesses and individuals.

#### **President Mortgage Store Commercial Ltd/Mortgage Store USA LLC**

Tasks include:

- Contacting clients and funding sources to set up meetings, either within an office environment or in clients' homes or business and set up phone conferences.
- Conducting in-depth reviews of clients financial circumstances, current provision and future aims.
- Analyzing information and preparing plans best suited to individual clients' requirements.
- Completing risk analysis and designing financial strategies.
- Assisting clients to make informed decisions through researching information from various sources, including providers of financial products.

- **Private security:** Provides evaluations on a client's current security system and recommendations for improvement without an affiliation to a security firm or the business that will install the recommended measures.

Tasks include:

- Provide consultation, threat assessment and physical security services to businesses and individuals for residential and personal property.
- Develop policies and procedures minimizing risk to properties, employees and executive staff.
- Provide evaluations and assessments in collaboration with staff for the security of the business and its employees.

### **PRESIDENT | CROSSWINDS DEVELOPMENT | 2013-PRESENT**

Crosswinds Development provide strategic leadership for the company by working with management to establish long range goals, strategies, plans, and policies.

Tasks include:

- Plan, develop, organize, implement, direct and evaluate the organization's fiscal function and performance as a strategic partner.
- Establish credibility for the finance group by providing timely and accurate analysis of budgets, financial reports and financial trends in order to assist the Board in performing their responsibilities.
- Enhance and/or develop, implement and enforce policies and procedures of the organization.
- Provide strategic financial input and leadership on decision making issues affecting the organization; i.e., evaluation of potential alliances and acquisitions and/or mergers, partnerships, and investments.

### **OUTSIDE CONSULTANT | BANK OF AMERICA**

Responsibilities were to first clarify the client's situation and then calibrate the point of view of the company. Once the situation was evaluated, I was to act as a catalyst with company leadership so the company could take the appropriate action.

### **FINANCIAL ADVISOR | WADDELL AND REED**

Responsible for financial planning for a multi-billion-dollar client base. Solely identified and developed personal client base through aggressive prospecting and networking.

Tasks include:

- Building portfolios that incorporated stocks, bonds, real estate, options, and insurance products. Implemented financial plans and operations through account development and growth.

### **JUVENILE COUNSELOR**

Counseled identified "at-risk" youth ensuring their overall well being. Collaborated with health care professionals for development of treatment plans for emotionally disturbed adolescents. Assisted clients in formulating survival skills to aid in transition to independent living situations. Identified service networks for academic, social, and psychological assistance.

### **ACCREDITATIONS AND LICENSES**

Real Estate License, Insurance License, Certified Counselor, Licensed Financial Consultant, Loan Officer, A.A. Degree Criminal Justice, B.S. Degree Criminal Justice, HIPPA certified.