Andrew J. A. Head, MAAE, CFP®

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CORE PROFESSIONAL SKILLS

Financial Needs Analysis	Insurance Needs Analysis	Consumer Debt Management
Business Development	Investment Research	Legacy & Estate Planning
Retirement Planning	Income Tax Planning	Professional Writing
College Planning	Investor Education	Public Speaking

PROFESSIONAL EXPERIENCE

Western Kentucky University — August 2010 – Present

Associate Professor / Director, WKU Center for Financial Success

- Tenure-track faculty member of the Finance Department in the Gordon Ford College of Business
- Founding director of the Center for Financial Success, overseeing multiple financial literacy/education programs
- Regular courseload includes Personal Finance (incl Honors sections), Insurance & Risk Management, Advanced Topics in Personal Financial Planning, and Financial Planning Practice Management

Journey Financial Management, LLC — Mar 2010 – Present

President / Financial Planner

- Co-owner/manager of a Kentucky-Registered Investment Advisory firm
- Personally manage client households in 6 states, providing a fiduciary standard of care
- Assist clients with comprehensive planning issues and investment portfolio management

Raymond James Financial Services — Jun 2009 – Mar 2010

Financial Planner

- Co-managed the sale and transition of 100 client households to a local RJFS branch
- Developed business model resulting in double-digit branch revenue increase, simultaneously reducing client fees
- Served in a consulting capacity for transitioned clients while attending full-time graduate school

Myers Investment Group, LLC. — Jul 2007 – Jun 2009

Financial Planner/Partner

- Co-managed approximately $30 million in client assets in 150 households
- Director of financial planning strategies for all client households
- Developed new client service model resulting in a 20% increase in new assets in 9 months

Argent Trust & Financial Services — Dec 2006 – Jun 2007

Vice President/Financial Advisor

- Partnership role with estate planning attorney in establishing new trust company in Arkansas
- Captured approximately $4 Million in new client assets in 6 months
- Delivered group presentations on Annuity Strategy and Qualified Investments in Real-Estate

Wachovia Securities, LLC (Private Client Group) — Jun 2004 – Dec 2006

Financial Advisor

- Generated more than $125,000.00 in revenue during the first 2 years in business
- Delivered sales and education presentations to groups of up to 50 people
- 100% retention of clients at the time of departure

EDUCATION

M.A. – Applied Economics, Western Kentucky University (2010)

B.S. – Business Finance & Personal Financial Planning, Western Kentucky University (2003)

CERTIFICATIONS & LICENSES

Certified Financial Planner®, Investment Advisor Representative, Licensed Agent (Life, Health, Annuities)