

Brandon Ridenour
719-477-3132
Email: Brandon@Kassira.com

Work Experience **Kassira Wealth Management:**

Wealth Manager

01/31/2022 - present

- Provides investment management services to individuals and businesses
- Assists with various financial planning needs including saving for retirement and retirement income planning.

T. Rowe Price:

Senior Financial Consultant – Personal Investors, High Value Client Engagement

1/2020 - 01/28/2022

- Partners with prospects and existing high net-worth retail clients with the goal of driving net new flows or retaining assets on behalf of the firm. Named to Circle of Excellence in Q1 2021 for best overall sales results
- Engages in consultative conversations with retail clients, listening for cues on client needs, and ensuring client satisfaction and retention. Received multiple written and verbal compliments in recognition of outstanding service
- Advises clients on financial planning best practices, organizational solutions, and regulatory changes.

Supervisor – Workplace Investor Services & Education

8/2018 – 12/2019

- Supervised team of retirement plan service associates providing services and education to workplace investors
- Utilized enhanced coaching techniques to drive exceptional customer service and superior performance
- Functional leader of Special Plans work stream, responsible for cross-site staffing, training, improving the business, and fostering relationship with 3rd party service provider (DST)
- Savvy interviewer with a passion for recruiting and successfully onboarding new associates
- Experienced practitioner of Lean Management, facilitated daily huddles and utilized other Lean tools to promote team engagement and eliminate waste across the organization
- Named Supervisor of the Quarter for Q4, 2018

Team Lead - Financial Institution Services

5/2015 – 8/2018

- Acted as primary supervisory contact for associates and specialists performing daily operations related to intermediary service and support.
- Functional leader of Advisor Services Group, responsible for staffing, training, and improving the business, servicing approximately 100 investment advisors
- Product owner for DST Vision, an interactive web platform that allows advisors and back offices to interact with client accounts
- Successfully led team as Acting Supervisor during Q4 of 2016.
- Led team to Team-of-Quarter distinction in Q2 and Q3 of 2017 due to high quality marks and largest number of client and process improvement ideas submitted.

Specialist - Retail Account Management

11/2013 – 5/2015

- Named Retail Account Management “Rookie of the Quarter” for Q1 2014.
- Selected to learn the Asset Transfer Group work-type in Owings Mills and then train Colorado peers as the Subject Matter Expert. This earned me the “Supporting the Business” and “Training and Coaching” awards for Q1 2014.
- Selected for Individual Investor Channel Sales Pipeline
- Promoted to service specialist position July 1st, 2014
- Completed T. Rowe Price Leadership Development Pipeline

Alano House:

Operations Manager

8/2006 – 11/2013

- Managed the operations of four sober living homes (58 beds) for recovering alcoholics and addicts and an outpatient drug and alcohol treatment center (700 unique clients in 2012), directly leading 15-20 staff and volunteers, and managing an annual budget of approximately \$450,000.
- Screened prospective clients and acted as a liaison between the client and their family members, probation officers, employers, etc.
- Performed various fundraising tasks such as grant writing, obtaining grants of \$10,000, \$21,000, and \$20,000 from foundations within Colorado.
- Organized outreach efforts at many community locations such as homeless shelters, detox clinics, jails, and prisons.
- Acted as the website developer and maintained the website www.alanohouse.org, a site which has obtained 36,000 hits.
- Performed tasks related to email marketing, maintaining a contact list of close to 600 subscribers.

Pikes Peak Library District:

Library Security Monitor / Clerk

9/2006 – 7/2010

- Ensured patron and staff compliance with general safety and security procedures.
- Responded to, investigated, and assisted with disturbances on library property.
- Maintained records and incident reports related to security.
- Acted as a liaison between local fire departments and local law enforcement organizations as necessary. I received the Citizen of Distinction award from KKTV and the Colorado Springs Police Department in 2011 for thwarting a potential robbery.
- Monitored fire, safety, and security alarm systems.
- Secured the library at opening and closing and performed periodic checks of the entire facility and surrounding grounds.
- Performed various clerical duties and maintained constant contact with the public. I received the Community Service Award and Working in the Zone awards from the Pikes Peak Library District in 2009.

United States Coast Guard
Marine Science Technician, 3rd Class

Education

University of Colorado at Colorado Springs:
 BS, Business Administration
 Magna Cum Laude GPA 3.7/4.0

Certifications

Series 7 and 66 Registered Representative; CERTIFIED FINANCIAL PLANNER™ candidate, Chartered Retirement Planning CounselorSM designation

Volunteerism

Alano House nonprofit board