Jason Gilman

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Professional Summary

Motivated Regional Vice President with an extensive career in financial services and a track record of driving sales and company morale. Hands-on, client oriented professional who implements creative business development strategies and is dedicated to continuous improvement.

Work History

Regional Vice President, 06/2018 to 11/2020
Ohio National Financial Services Inc. – Pittsburg, CA

- Managed 300 appointed Independent and Career Advisors in the Northern California Region
- Responsible for recruiting 36 Advisors each year
- Mentored and coached advisors to achieve company's production goals for Northern California Region
- Drove performance initiatives, facilitating highest premium increase over goal in the company for 2019..
- Lead company in number of paid cases and premium for Advisors in their second year in 2019.
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District Branch Manager , 12/2015 to 07/2018
Waddell and Reed Financial Advisors – Concord, CA 94520

- Oversee recruitment, selection, procurement and licensing of new advisors.
- Provide professional development opportunities for personnel.
- Develop and support resources for mentoring activities within the branch.
- Managing and educating employees in the branch office to comply with all firm policies and procedures, FINRA rules and industry regulations.
- Provide sales support help/conduct/monitor sales meetings and production reviews.

Financial Planner, 04/2013 to 11/2015
Met Life Premier Client Group – 1410 Guerneville Road Suite 15 Santa Rosa, CA 95403

- Profiled and analyzed investment products to develop customized financial strategies for clients\' financial needs.
- Sold financial products including stocks, bonds and mutual funds.
- Interviewed clients to determine current income, expenses, insurance coverage, tax status, financial objectives, risk tolerance and other information needed to develop a financial plan.

Managing Sales Director, 03/1997 to 04/2013
Met Life – 120 Stony Point Road Suite 120 Santa Rosa, CA 95401

- Developed a comprehensive training program for new sales associates.
- Registered Principal for the office and reviewed all new business applications for accuracy and suitability.
- Performed Annual Individual Compliance Reviews for all advisors.
- Performed Detached Office inspections to verify compliance with all FINRA Regulations and Firm Policies.

Master Sergeant, 01/1982 to 04/2013
United States Air Force Reserves – Travis AFB, CA
Activated 3 times in support of Operation Enduring Freedom and Operation Iraqi Freedom. Retired 2013.

Financial Services Representative, 05/1991 to 07/1997
Met Life – 120 Stony Point Road Suite 120 Santa Rosa, CA 95401

- Identified and solicited sales prospects in agency databases.
- Evaluated leads obtained through direct referrals, lead databases and cold calling
- Sold life, health, disability, securities and other various insurance products to individuals and affinity groups within assigned territory using consultative selling techniques.

Education

Associate of Science: Avionic Technology, 1985
Santa Rosa Junior College - Santa Rosa, CA

Certifications

- FINRA Series 6,7,63,65 and 24 Licenses
- Financial Planning and Advisory Certifications
- Life and Health License
- LUTCF Designation