BLAKE C. POKLEY, CFP®

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PROFILE

Motivated CERTIFIED FINANCIAL PLANNER™ who has demonstrated the ability to take on a very demanding workload and be successful in its completion. Possesses exceptional leadership, communication, and decision-making skills, as well as strong analytical, numerical, and writing skills.

EDUCATION

OAKLAND UNIVERSITY – Rochester, MI
Date of graduation: April 2018 GPA: 3.7

- Presidential Scholarship recipient with a Bachelor of Science degree in Finance with an Accounting minor
- President of Freedom Fighters 6.12 (anti-trafficking student organization)
- Member of the Student Services Committee of Student Congress

FINANCIAL EXPERIENCE

CAPTAIN (branch of "ABIDE MINISTRIES") – Auburn Hills, MI April 2020 – Present
Founder/Financial Planner

- Meet virtually (using Zoom or Google Hangouts) or over the phone with individuals to learn about their current situation and goals in order to work with them to help them reach those goals
- Help clients through difficult financial/life decisions, tax difficulties, goal setting, and planning by utilizing financial projections created in Google Sheets
- Assist clients with tax preparation using free online software through TurboTax, H&R Block, and Free 1040 Tax Return, while finding them ways to minimize taxes and maximize credits
- Create and maintain the content for the website, along with the "Financial Questions" blog/database using WordPress and Elementor
- Created and submitted a requested proposal to the National Basketball Association (NBA) regarding working with their players 1-on-1 and teaching in a group setting for free

SEQUOIA FINANCIAL GROUP (LJPR FINANCIAL ADVISORS) - Troy, MI May 2016 – December 2019
Intern / Client Service Specialist / Support Advisor / Associate, Private Client Services

- Built numerous calculators in Microsoft Excel, my favorite being a complex multi-purpose two-generation financial planning calculator for the future passage of the SECURE Act (includes bracket-topping toggle feature, Social Security benefit/taxable amount calculator, tax calculator, and takes into account the most common aspects of a family's financial situation)
- Aggregated clients' outside assets with their managed assets to analyze the allocation and how it compared to the target model portfolio we recommended, then made specific trade recommendations based on this analysis
- Was the lead advisor on 20 client relationships and support advisor on 80+ relationships prior to leaving
- Wrote 2 blogs for Sequoia: "Think Goals-Based Planning, Not Return-Based Planning" and "Budgeting: Live the Way You Actually Want To"
- Utilized Microsoft Excel, the Bloomberg Terminal, Morningstar, MoneyGuidePro, Tamarac, SalesForce, Schwab Advisor Services™, and Fidelity Wealthscape℠ as necessary
- Supported financial advisors and CSA's by completing research, forms, and other tasks as requested
- Studied for and passed the Series 65 and CFP® exams while a full-time student
- Conducted research for LJPR's company blog and created a planned giving guide for clients
- Prepared and amended tax returns using UltraTax with minimal training
- Reviewed and edited financial literacy materials on an ongoing basis

BANK OF AMERICA MERRILL LYNCH – Troy, MI June 2015 – August 2015
Wealth Management Intern