

Jayn Krasco Stillson

Objective:

Opportunities to work with extraordinary women and make a contribution to their financial success.

Skills & Experience:

- Held Series 7/66 Securities and Life Insurance Licenses.
- Managed the start-up phase of a highly successful non-profit agency.
- Founding member of a women's investment club and a women's networking group.
- Highly organized with excellent problem solving abilities.
- Dependable, honest, supportive and creative.

Work History:

2008 - Present Self-Employed Financial Coach

Advice and support on personal business matters, specializing in working with women who have had a life event [divorce, inheritance, career success, lottery] that resulted in a significant financial windfall. Services are broad and comprehensive including but not limited to life coaching, budgeting/cash flow management, small business coaching and introductions to and follow-through with financial professionals such as financial advisors, accountants, attorneys, banking and insurance agents. Classes also offered where clients explore and identify their ultimate life purpose and learn to approach their relationship with money in a more powerful, meaningful way.

2001-2008 Financial Advisor - Waddell & Reed

Provided financial advice and guidance to individuals and small businesses regarding retirement, insurance and education planning, with special emphasis on working with single professional women and female small business owners. Solely responsible for all aspects of generating new business and building a successful financial planning practice.

1997 - 2000 Self-Employed Accounting Assistant

Transitioning from accounting to personal financial planning. Working with individual clients in various capacities, including fundamental financial planning, Quickbooks training and general accounting support.

1997-1999 Accounting Assistant - Hillary Tentler, CPA, Santa Barbara, CA

Assisted CPA through two tax seasons, offering tax preparation, general accounting and office support.

1995-1997 Accounting Assistant - Michael S. Nichols, CPA, Santa Barbara, CA

Assisted CPA in the preparation of individual, corporate and partnership income tax returns and non-profit information returns on Lacerte software. General accounting and office support.

1994-1995 Financial Manager - The Dream Foundation, Santa Barbara, CA

Responsible for all financial matters of the organization. Also played a key role in the Foundation's incorporation and IRS approval of non-profit status.

1986-1994 Self-Employed Bookkeeper, Santa Barbara, CA

Offered complete bookkeeping services, including computerized financial statements, payroll services, sales tax reporting, accounts payable and receivable, bank reconciliations and organization of financial records.

Education:

Academy for Coaching Excellence Coaching Program, completed 2010
College of Financial Planning, CFP Program, completed 1999
A.A., Finance, Santa Barbara City College, 1994
H&R Tax Prep Course, 1988