Firm #F-12537

Wendy Rogers, MBA

President

Professional Experience

Mrs. Rogers has thirteen years of experience in the banking industry as well as in various capacities in the financial services industry. She has previously held her Securities License as well as a Registered Investment Advisor license. She has now transitioned that experience to the utility coordination services company—JR Utilities.

Years of Experience

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Education

B.S. Agribusiness
Texas A&M University
Summa Cum Laude
1998

Master of Business Administration
University of Houston at Victoria
2004

Registrations/ Certifications

Group 1 Life Insurance License #977455

Affiliations

National Association of Professional Women

Business Experience

Retirement Value, LLC, New Braunfels, Texas
CEO April 2010-May 2010
Vice President, Administration & Services Feb. 2006-Mar. 2010

- Partnered with professional colleagues to create a re-sale life insurance program
- Assisted with back office duties to process retail client paperwork
- Developed a wholesale model to market our product through a network of licensees
- Created online forms through Adobe Acrobat and wrote auto-fillable formulas utilizing JavaScript
- Formed, managed, and streamlined several departments (licensing, client services, policy servicing, and finance)
- Interviewed candidates and hired employees for all of our departments

Barnard-Donegan Insurance, Seguin, Texas
Retirement and Estate Planning Partner Nov. 2004-Jan. 2006

- Scheduled and organized marketing seminars in The Valley to target the winter Texas market
- Followed-up with prospective clients through the pipeline from seminar attendee to valued client
- Tracked insurance/investment applications through their respective completion processes
- Assisted three financial service providers with marketing to their various prospective clients

JPMorgan Chase Bank, New Braunfels, Texas
Personal Banker, Bank Officer June 2001-Oct. 2004

- Developed relationships with a portfolio of 400+ clients
- Managed approximately $40 million in banking and investment assets
- Proactively profiled clients, identified specific needs, and scheduled appointments between clients and a Personal Financial Advisor
- Focused on client retention and expansion by exceeding expectations through customer satisfaction
- Cannon Financial Institute training on trusts and financial planning concepts

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Business Experience (continued)

Tanglewood Financial Services, Inc., Houston, Texas
Financial Services Assistant June 2000-June 2001

- Helped to start this financial services subsidiary of Bank of Tanglewood from the ground up
- Laid the groundwork for unique business processes to better serve our customers
- Offered a high level of customer service through brokerage services, insurance products, and banking services
- Analyzed individuals' and estates' assets by utilizing Morningstar
- Placed stock, mutual fund, and annuity trades online; opened brokerage accounts
- Facilitated and coordinated the relationships between bank customers and the President of Tanglewood Financial Services

Calderwood Financial Strategies, Inc., Houston, Texas
Financial Planning Professional Nov. 1999-June 2000
Phoenix Financial Associates, Houston, Texas
Technical Support/Planning Assistant

- Implemented the strategies behind business and individual financial planning
- Interacted with a team of advisors, CPA's, and lawyers to develop planning models
- Personally serviced client accounts from filling out applications to delivering policies to affluent clients
- Worked with the owner/manager one-on-one to put together client presentations; attended various client appointments with him
- Analyzed existing clients' insurance portfolios to determine additional needs

Prudential Financial Planning Services, Houston, Texas
Planning Assistant Oct. 1999-Nov. 1999

- Mastered financial planning software
- Processed financial plans and product implementation
- Updated financial planner compliance library

Marketing Assistant Jan. 1999-Oct. 1999

- Assisted advisors with developing a marketing strategy to expand their client portfolio
- Generated a weekly advisor activity tracking report for the management team
- Interviewed prospective financial planner candidates in a role-playing format