**RANDY BLISS**

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**PROFILE: FINANCIAL ADVISOR, RETIREMENT INCOME PLANNER**

*Offers financial analysis and develops strategic solutions to achieve and exceed clients’ financial goals.*

Performance-driven financial adviser with extensive experience in sales and marketing of diversified investment products and services to the qualified plan market and individuals. Demonstrated success in leveraging financial planning knowledge and utilizing numerous suitable financial tools, instruments and products (investments, insurance, annuities, etc.) in a variety of complex scenarios. Relationship-development expertise that complements the ability to aggressively build solid client base and drive revenue growth. Proven leadership and team-building skills, coupled with the ability to consult, collaborate, and advise financial teams in methods to optimize and achieve financial goals. Maintains a broad knowledge of the financial advisory industry and product information.

**SELECTED ACHIEVEMENTS**

* **Chartered Financial Consultant**, **Chartered Life Underwriter**, **Certified Annuity Specialist**.
* **Created a “Retirement Income Planning Process”** to develop effective retirement income plans for clients that are easy to understand and implement. Particularly effective at developing retirement income plans for individuals and couples approaching retirement that emphasizes providing *guaranteed income for life.*
* **Managed over $160,000,000 AUM on regular basis with excellent results** (120 qualified plan clients; 40 individual clients).
* **Generated ~$ 9,000,000+** in annuity premiums over the past three years.

**PROFESSIONAL EXPERIENCE**

**PASI, LLC / PASI Investments, LLC**, Farmington, CT 1995-2016

*(Designs, installs, and administers qualified plans for small businesses and non-profit companies.)*

**Investment Manager – Qualified Plans**

Conducted investment management of qualified plans. Interacted closely with plan trustees regarding investment selection, monitoring, reporting, changes, and performance. Developed unique “Managed Portfolios” to help participants make suitable investment choices. Also created individually designed portfolios for participants.

* **Conducted** employee investment education and enrollment regularly on-site at participants’ locations.

Concurrently acted as Chief Compliance Officer, in addition to investment management responsibilities to ensure all firm’s regulatory compliance processes and procedures were in accordance with registration filings with the SEC (FINRA).

**Financial Adviser/Retirement Income Planner – for Individuals** 2012-2016

* **Spearheaded, created, administered, and implemented comprehensive** individual investment planning line of business.
* **Leveraged exceptional communication and presentation skills** with clients in order to obtain information regarding income needs, risk tolerance, and financial goals. Used this information to develop comprehensive retirement income plans.

**YHB Consulting, LLC**, West Hartford, CT 1986-1995

*( Small business consulting services.)*

**Financial Planner**

Performed management consulting for hundreds of small businesses involving strategic planning, ownership transfer planning, employee benefit planning, investing, and retirement planning.

**EDUCATION**

* **Bachelors of Finance**

University of Utah, Salt Lake City, UT

* **Master’s Degree in Management and Organization (MBA)**

Central CT State University, New Britain, CT

* **FINRA Series 6, 63**, **22**.
* **Life Insurance, Accident & Health Insurance, and Annuity Licenses.**