

Steven R. Conkin, MBA, ChFC, CFP®

• 1616 E. 19th Street, Suite 404, Edmond, OK 73013 • Office (405) 348-6200
• steve.conkin@conkinfinancial.com • Cell (405) 657-6202 • Fax (405) 252-5631

EDUCATION

Oklahoma State University , Stillwater, Oklahoma Bachelor of Science in Finance	1999
Oklahoma State University , Stillwater, Oklahoma Master of Business Administration (MBA)	2001
CFP Board of Standards, Inc. , Denver, Colorado Certified Financial Planner (CFP®) designation	2003
The American College , Bryn Mawr, Pennsylvania Chartered Financial Consultant (ChFC) designation	2003

SKILLS

Financial Advisor – FINRA Series 65
Retirement Plans – 401a, 401k, 403b, 457, Defined Benefit

ACTIVITIES

Private Pilot

Earned private pilot single-engine land rating in April of 2003.

EMPLOYMENT HISTORY

Conkin Financial Group, Inc. , Edmond, OK President	January 2011 - Present
--	------------------------

Responsibilities include holistic financial planning for individuals and retirement plan advice to individuals, corporations, and governmental entities.

Advised Assets Group , Madison, WI Senior Portfolio Manager	July 2007 – December 2010
--	---------------------------

Responsibilities included conducting investment reviews for retirement plan sponsors with combined assets of over \$3B. Client types included 401k, 403b, 401a, Defined Benefit, and individuals. Other responsibilities included serving as a resource to sales and service personnel within the firm as well as other investment specialists, and maintenance of the firm's buy, hold, and sell lists.

Advised Assets Group , Denver, CO Investment Analyst	October 2006 – June 2007
---	--------------------------

Responsibilities included the analysis of mutual funds, collective trusts, and stable value options within the context of group retirement plans. Other responsibilities included responding to RFPs, creating fund mappings, and assisting advisors, consultants, and sales managers.

Security Benefit Group of Companies , Topeka, KS Intern - Internal Wholesaling Department	May 2001 - July 2001
--	----------------------

Responsibilities included in-bound and out-bound service and marketing calls to registered representatives.

Conkin Financial Group, Inc. , Edmond, OK Plan Communications Associate/Investment Researcher	May 1996 – August 2006
--	------------------------

Responsibilities included client communications and research of investments for use in portfolios. Clients include individuals, corporations, and governmental entities.