

MICHAEL L. SCHUDEL

Objective: To Utilize My Legal and Financial Background in a Professional Capacity

EXPERIENCE

Carson Wealth Management Group, Omaha, NE July 2014 - May 2017

Insurance Advisor

- Strategized and sold insurance solutions (disability, life & long term care) to high net worth clients
- Provided policy service and analysis to existing policy owners
- Created sophisticated insurance and planning content for distribution amongst Carson Group's Advisory Platform

Concordia University, Seward, NE 2011-2012

- Adjunct Professor for two eight-week online courses: Family Law and Financial Planning for Seniors

Northwestern Mutual, Omaha, NE July 2007 - July 2014

Financial Representative

- Identified prospective clients, scheduled meetings with them to initiate the financial planning process
- Identify financial goals and needs of my clients
- Present both insurance and investment solutions
- Maintain relationships with clients on ongoing basis monitoring their evolving needs

Silverstone Group, Omaha, NE May. 2006 – July 2007

Account Manager

- Worked in client acquisition and relationship development in the group health insurance market
- Conducted annual group health insurance plan reviews with clients
- Gathered bids from insurance carriers and prepared those bids for client presentation

TierOne Bank, Lincoln, NE May. 2004 – May 2006

Credit Analyst

- Gathered bank client financials to assess creditworthiness
- Prepared and presented both new client applications and existing client financials to senior loan officers

EDUCATION

University of Nebraska College of Law, Lincoln, NE Graduated May 2006

Juris Doctor

Baylor University, Waco, TX Graduated May 2003

Bachelor of Arts in Communication Studies/Pre-Law

LICENSURE: Licensed to practice law in Nebraska & U.S. District of Nebraska; State Insurance Licensed in Nebraska

PROFESSIONAL DESIGNATIONS

Certified Financial Planner (CFP)
Chartered Financial Consultant (ChFC)
Chartered Life Underwriter (CLU)
Chartered Adviser of Senior Living (CASL)
Series 6, 63 and 65 Exams

ACTIVITIES/ORGANIZATIONS

Boy Scouts of America – Eagle Scout
Attend Church at Good Shepherd
Member of NAIFA