ERIC SAWYER, MS, CFP®

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PROFESSIONAL LICENSES

- CFP®, Series 7, Series 63, Series 65, Texas Group 1 Insurance

EMPLOYMENT

January 2013 – Present **Texas Tech University**
Department of Personal Financial Planning
Director of Planning ***Lubbock**, TX*

- Preparing students for work as financial planners with projects provided by financial service companies through credited course work.

September 2010 – Present **Peacefield Wealth Solutions, LLC**
Owner/Financial Planner *Dallas, TX / Lubbock, TX*

- Offering fee-based comprehensive financial planning services, including asset management, insurance, retirement, education and estate planning for families, business owners and retirees.
- Working with strategic partners such as business brokers, CPAs, third party administrators, business coaches, and estate and tax attorneys to add client value.
- Restructuring or implementing business clients' retirement plans such as 401ks and SEP IRAs to maximize their savings and reduce their costs and employee contributions
- Providing risk management solutions including life insurance (term and cash value), disability and long-term care insurance.
- Cash flow and investment planning using mutual funds, variable, fixed and equity indexed annuities, REITs and structured products.

September 2012 – December 2012 **Southern Methodist University**
Investments Instructor *Dallas, TX*

- Instructor for a 12 week course in investments for SMU's CFP certification program.

January 2011 – April 2011 **University of Texas at Arlington**
Estate Planning Instructor *Arlington, TX*

- Instructor for a 12 week course in estate planning based on materials provided by the College for Financial Planning for UTA's CFP certification program.

October 2007 – August 2010 **ConfidentVision**
Director of Financial Planning *Dallas, TX*

- Directed work flow and supervised staff and their creation of financial plans and strategy implementation
- Built a partnership with a team of tax attorneys for high net worth income tax planning
- Proposed, presented and implemented recommendations on topics including investment allocation, cash flow, taxes, estate, insurance, retirement, education and business planning
- Created the firm's investment committee to establish our investment philosophy and regular review of portfolios focusing on the income needs of our clients and the use of non-correlated assets
- Worked directly with the advisors to implement marketing strategies

July 2004-September 2007 **Quest Capital Management, Inc.**
Associate Financial Planner *Dallas, TX*

- Proposed, presented and implemented recommendations on topics including investment allocation, cash flow, taxes, estate, insurance, retirement and education
- Responsible for daily service and financial plan creation for one of the company's teams with over 50 client relationships, including executives, small business owners, retirees, doctors and attorneys
- Created strategies with the production department to efficiently produce financial plans
- Created and delivered presentations for young adult financial education workshops
- Served on Technology Committee to analyze and choose a new financial planning software

December 2002-July 2004 **The Shobe Financial Group**
Associate Financial Planner *Baton Rouge, LA*

- Worked directly with clients under the supervision of one of the firm's principals as well as with other client managers; clients included retirees with about $300,000 in assets to small business owners with over $1 million in assets
- Conducted client meetings, proposed and implemented financial plans
- Prepared and presented a weekly securities market recap at staff meetings

April 1999-December 2002 **U.S. Senator Phil Gramm**
West Texas Regional Assistant *Lubbock, TX*

- Maintained and updated databases for seven Texas offices and the Washington, DC office
- Organized logistics and programs for Senator Gramm
- Scheduled meetings for the Senator's Regional Director
- Managed daily office activities including ongoing constituent service

LEADERSHIP EXPERIENCE

2013-Present *Member* **West Texas FPA**

2004-2011 *Member* **Dallas FPA Government Relations Committee**
2006-2008 *Board of Directors* *Dallas, TX*

- Established and held two statewide Financial Planning Day events at the Texas State Capitol

November 1995-May 1996 **City of Hearne, Texas**
Councilman, Place 6 *Hearne, TX*

- Elected to an un-expired term
- Worked with a $5.8 million budget and helped conduct a cost-effective overhaul of city streets and utilities

EDUCATION

- **December 2002** **Texas Tech University**
  Master's Financial Planning *Lubbock, TX*

- **May 1998** **Texas A&M University**
  B.S. Political Science/Economics *College Station, TX*