



TORIAN PIZZOLA: MSFP

PROFESSIONAL SUMMARY

I partner with individuals for 1:1 personal financial planning education and group programs to educate their clients on financial literacy and strategies to help clients create personal economic stability, reduce stress, achieve long-term financial well-being and increase successful outcomes.

Certified Financial Planner with expertise in creating comprehensive financial plans tailored to meet high-net-worth individual and holistic family wealth goals.

I provide group virtual financial education classes, 1:1 virtual coaching and education sessions.

CERTIFICATIONS

- Certified Financial Planner - CFP Board ID #: 301229 – (inactive)
- Series 7 - CRD #: 6276000 (inactive)
- Series 66 - CRD #: 6276000 (inactive)
- CA: Life, Accident and Health, Variable Contracts- License #: 016327 (inactive)

SKILLS

- Financial Planning
- Investment Management
- Portfolio Construction
- Wealth Preservation
- Estate Planning
- Budgeting / Saving
- Tax Mitigation Tactics
- Retirement & Income Projections / Strategies

WORK HISTORY

PERSONAL FINANCE EDUCATOR / FOUNDER: 04/2025 to Present

Slide Show Personal Finance, LLC

- Develop and teach live virtual personal finance education curriculum specifically developed for recovery and treatment centers.
- 1:1 Personal finance coaching and education.
- More information can be found at: www.slideshowpersonalfinance.com

FINANCIAL CONSULTANT: 07/2018 to 04/2025

Fidelity Investments

- Total book assets surpassed \$400,000,000.
- Constructed comprehensive financial plans for High-Net-Worth clients to achieve short and long-term financial goals.
- Average client investable assets were >\$1,000,000.
- Conducted 4-5 client-facing appointments per day.

- Main responsibilities included implementation of wealth management strategies, asset management services, and deepening client relationships through ongoing financial planning services.
- Advised clients on investments, retirement, tax and estate planning strategies.
- Delegated and managed support team member(s) tasks and responsibilities per business needs.

INVESTMENT CONSULTANT: 10/2016 to 07/2018

Fidelity Investments

- Educated clients on potential risks and rewards associated with various investments.
- Collaborated with clients to develop customized investment portfolios.
- Monitored and updated financial plans to align with client goals.
- Developed and implemented financial plans and investment recommendations to clients.
- Provided specialized financial planning support for clients with diverse portfolios and individual needs.
- Analyzed the financial needs of clients and developed tailored strategies to meet goals.

REGISTERED SALES REPRESENTATIVE: 05/2015 to 05/2016

CML Wealth Management, RIA

- Managed client investment accounts, with total firm assets surpassing \$100,000,000.
- Introduced rebalancing software to dramatically increase efficiency.
- Rebalanced client portfolios while considering client goals, account types, and tax ramifications.
- Determined appropriate investment and distribution strategies for unique client circumstances and tax situations.
- Formulated portfolio construction for Special Needs Trusts and worked closely with trustees to develop compliant allocations.
- Analyzed clients' Social Security benefits and recommended collection strategies to maximize payments.
- Analyzed and executed client cash flow strategies and retirement distribution strategies.

ASSOCIATE FINANCIAL REPRESENTATIVE: 10/2014 to 05/2015

Northwestern Mutual Insurance Company

EDUCATION

California Lutheran University, Thousand Oaks, CA

Master of Science, Financial Planning, 12/2024

- Cum Laude

University of California - Irvine, Irvine, CA

Personal Financial Planning Certificate, 2016

California State University - Fullerton, Fullerton, CA

Bachelor of Arts, Speech Communication (Rhetoric & Persuasion), 2014

- 3x First Place Speaker - Collegiate Debate (CSUF)
- Graduation Commencement Speaker