



# Kelly Woo, CFP®

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## Experience

### **January 2012–Present**

Principal & Co-Founder • Profectus Financial and Insurance Services, Inc.

Provides financial consulting, pension planning, retirement planning, insurances planning, and estate planning

### **April 2013–Present**

Principal & Co-Founder • Profectus Wealth Management, Co.

Provides financial planning, investment planning and wealth management

### **May 2010–Present**

Principal • RGL Group Insurance & Financial Services, Inc.

Provides insurances planning, and consulting to other insurance and financial professionals

### **February 2006–December 2008**

Agent / Financial Services Professional • New York Life

Provides insurance planning and retirement planning for individuals and retirees

### **December 2008–May 2010**

Personal Loan Consultant • Countrywide Bank

Provides loan consulting for high net worth individuals



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