JORDAN FANDRY, CFP®

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Manske Wealth Management

A disciplined and well-credentialed wealth management firm providing sophisticated wealth management and individualized investment advice with a primary focus on offering monthly communication to all clients. The firm's accomplishments include:

- 2020 Selected as one of the Best Financial Planning & Investments Services in the great Houston Area by the Houston Chronicle
- 2019 Recognized as the eighth largest Registered Investment Advisory firm in Houston by Financial Advisor Magazine
- 2009-2020 Named Five Star Wealth Manager by Texas Monthly Magazine
- 2014 Named "Most Client Focused Wealth Manager – Texas" by Wealth & Finance International Magazine
- Praised or otherwise recognized in a number of publications including The Wall Street Journal and Forbes

Senior Financial Advisor – Leading the Consultant Advisory Group

In addition to general investment planning and personalized wealth management, I lead the Consultant Advisory Group which serves leaders at firms such as KPMG, Ernst & Young, Accenture and PwC. The Consultant Advisory Group offers tailored solutions such as: enhanced oversight to ensure no violations of independence or investment compliance policies; holistic benefit evaluation and in-depth financial modeling; package evaluation ahead of a firm change; and exit analysis ahead of going independent.

Accomplishments include:

- Featured speaker over breakfast to more than 40 Houston business owners in the River Oaks area
- Presented at Accenture's Houston Innovation Hub on the topic of smart money management and more
- Published by Forbes on the topic of risk tolerance as it related to retirement planning
- Featured in VoyageHouston for their Houston's Most Inspiring Stories series
- Published by Fiduciary News regarding individualized portfolio design
- Current member and Education Coordinator of the River Oaks Chapter of BNI – formerly served as Visitor Host
- Twice awarded Best Speaker by the Daybreakers Toastmasters club where she is a former member
- Provided extensive research on the history of the US stock market for the book, *The Prepared Investor*
- Completed Rice University's CFP® Certification Education Program
- Currently in good standing with the board as a CERTIFIED FINANCIAL PLANNER™
- Earned Chartered Retirement Planning Counselor (CRPC®) designation via College for Financial Planning
- Achieved Certified Funds Specialist (CFS®) designation via Institute of Business & Finance

Personal & Odd Facts

- Passionate about tennis, investments, art, cooking and helping others
- Helped raise thousands of dollars for Delta Gamma's philanthropy, Service for Sight, which helps the blind and visually impaired
- Volunteered at the Lighthouse of Houston to offer companionship and assisted with recreation classes for the blind and visually impaired
- Born in Alberta, Canada and raised in Houston – visits Canada frequently to see family and enjoy the mountains
- Always finding new ways to fuel her competitive side – most recently working on her golf and pickleball game
- Scored in the top 13% in the nation for mastery of mathematical concepts, principles and knowledge
- Recipient of the Allen Holtman Sportsmanship Award for her exemplary team leadership on the tennis court
- Ask her about her European travel adventures including her 3-week tour of Italy!
- Plans to attend all 4 Grand Slam tennis tournaments after an unforgettable experience at the 2016 French Open

University of Houston B.S. Mathematics with specialization in Mathematical Finance

"Define success on your own terms, achieve it by your own rules, and build a life you're proud to live." – Anne Sweeney