

AARON D. KIRK

4108 N. Glenwood Ave
Muncie, IN 47304

650.471.5296

adakirk@gmail.com

SUMMARY

Dedicated early childhood educator with a unique blend of classroom leadership and professional experience in client-focused roles. Passionate about creating nurturing, engaging, and nature-based learning environments that foster curiosity, independence, and kindergarten readiness. Demonstrated success in developing developmentally appropriate curriculum, guiding young learners through critical early milestones, and building strong connections with families. Brings 20+ years of communication, planning, and organizational skills from diverse roles—including teaching, financial advising, and program management—to create meaningful and well-rounded early learning experiences.

EXPERIENCE

Citi Personal Wealth Management, Oakland, CA *Financial Advisor* | 2018 – 2024

- Achieved consistent year-over-year growth of 10%+ by building a profitable book of business through effective networking, prospecting, and collaboration with branch associates.
- Developed comprehensive financial plans utilizing proprietary software to guide clients toward their financial goals.
- Expertly balanced client acquisition, financial planning, and portfolio implementation to maximize client satisfaction and financial outcomes.

Merrill Lynch, Oakland, CA *Financial Advisor* | 2017 – 2018

- Constructed and managed diverse investment portfolios, translating complex financial products into easily understandable language for clients.
- Strengthened client relationships by providing tailored financial solutions and exceptional service, resulting in increased client retention.

OAKLAND GARDEN SCHOOL, Oakland, CA *Lead Teacher, 4 and 5 year old classroom* | 2015 – 2016

- Designed and implemented an engaging, nature-based curriculum that ignited a passion for learning and effectively prepared children for kindergarten.
- Orchestrated and supervised enriching field trips for a cohort of 24 energetic children, promoting physical activity and cultivating a genuine bond with the natural world.

MORGAN STANLEY, Oakland, CA *Registered Associate* | 2012 – 2014

- Supported advisors in a \$100+ million practice, handling administrative tasks and managing complex financial forms with precision.
- Obtained Series 7, Series 66, and California Insurance Licenses, facilitating comprehensive financial support for clients.

ERICSSON (formerly Redback Networks), San Jose, CA *Sales Program Manager* | 2007 – 2010

- Led sales efforts for central and eastern Europe, collaborating across departments to resolve issues, fulfill orders, and manage client relationships.

- Reduced lead time and improved customer satisfaction through effective communication with global and European sales teams.

KIRK'S BIKE SHOP, Muncie, IN *Sales Associate* | 1995 – 1998, 2003, 2005 – 2006

- Managed inventory, recommended products, and provided exceptional customer service, contributing to store success.

LAFAYETTE BANK & TRUST, West Lafayette, IN *Sales Associate* | 2004 – 2005

- Exceeded standards for opening new accounts and referrals, earning recognition and bonuses.

EDUCATION

- B.S., Organizational Leadership, Anderson University, Anderson, IN (summa cum laude)
- 12 credits in Early Childhood Development, Cerro Coso Community College, Ridgecrest, CA

SOFTWARE SKILLS

- Business Objects, Oracle, Salesforce.com, Microsoft Office, Money Guide Pro,