

STEVEN JOSEPH DAWSON

Highly accomplished financial advisor with a strong background of over 11 years successfully implementing wealth management, investment strategies, financial planning, and risk management to guide clients towards retirement and achieving their goals

SKILLS

- Strong communication and relationship building skills
- Able to leverage friendly personality to establish trust and rapport with people from all walks of life
- Highly collaborative and detail-focused professional
- Direct the daily operations of my financial services firm to ensure we are taking care of our clients with regular contact, account reviews, and time sensitive service
- Highly skilled in creating investment solutions and effective financial management strategies for clients based on their needs, goals, and lifestyle
- Proven ability to effectively handle multi-task levels of management responsibility to provide team leadership, motivation, and development
- Experienced in account performance analysis, investor relations, market research, financial planning, and networking

PROFESSIONAL EXPERIENCE

Dawson Private Wealth – Raymond James
Financial Advisor, President

June 2017 – Present

Dawson & Associates – Ameriprise
Financial Advisor, President

February 2014 – June 2017

Edward Jones
Financial Advisor

February 2010 – February 2014

LICENSES & CERTIFICATIONS

Certified Financial Planner [™]
Certified Insurance Consultant License (Life & Health), Individual
Series 10 – FINRA

Series 9 – FINRA
Series 66 – FINRA
Series 7 – FINRA

EDUCATION

Master of Science, Business/Managerial Economics, Texas A&M University-Commerce

Bachelor of Science, Speech Communication, Texas A&M University-Commerce

ORGANIZATIONS

Financial Planning Association
Kingdom Advisors
Million Dollar Round Table
Assistance League of Greater Collin County
Wipe Out Kids' Cancer
Salvation Army
C.A.L.E.B. – Christ's Angels Leaving Everlasting Blessings, Inc.
Providence Church - Deacon