

Eli Ramirez

Financial Advisor



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Education

Bachelor's of Science: Finance,
University of Louisiana at Lafayette
2012

Chartered Financial Consultant (ChFC)
08/2022 – 06/2023
Currently Pursuing

Certified Financial Planner
08/2022 – 06/2023
Currently Pursuing

Certificates

Series 6
*Investment Company and Variable Contracts
Products Representative Exam*

Series 63
Uniform Securities Agent State Law Exam

Series 7
General Securities Representative Exam

Series 66
Uniform Combined State Law Exam

Securities Industry Essentials Exam (SIE)

Professional Experience

Financial Advisor,
Cornerstone Financial Group, Inc.
03/2022 – present | Lafayette, LA

Financial Advisor, *Wells Fargo Advisors*
03/2018 – 02/2022 | The Woodlands, TX.

Private Client Banker, *JP Morgan Chase Bank*
2014 – 2018 | Houston, TX

Personal Banker, *Chase Bank*
2013 – 2014 | San Antonio, TX.

Organisations

**University of Louisiana at Lafayette Alumni
Association,** *Chapter President*
San Antonio, TX

Gigi's Playhouse Sugar Land,
Committee Member
Sugar Land, TX

Leadership Institute of Acadiana,
Intro Lafayette Class
04/2022

Leadership Institute of Acadiana,
Acadiana Onboard
08/2022

OneAcadiana, *1A Ambassador*
07/2022

Acadiana Center for the Arts,
President's Circle Member
07/2022

Downtown Lafayette Unlimited,
New Members
07/2022