



J. Patrick Ottley

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Dynamic and disciplined professional with a comprehensive background in athletic leadership, financial analysis, and client relationship management. Holds a strong focus on developing strategic financial solutions and continuous professional growth, with a foundational belief knowledge has two uses: one for others or the self.

Education:

Williams College, Williamstown, 2022
MA, B.A. Philosophy & Political Science.
- Refined a robust acumen, cultivated ability to analyze, synthesize diverse perspectives for nuanced problem-solving.
Vail Ski and Snowboard Academy, Minturn, CO 2017
Completed rigorous athletic training, balancing high-performance sports with academics.
- Demonstrated extraordinary discipline and resilience in the only public, ski academy in the U.S.

Certifications:

- Securities Industry Essentials (SIE), FINRA 2024
- Series 6 – Investment Company and Variable Contracts Products Representative, FINRA 2024
- Series 63 - Uniform Securities Agent State Law Examination, NASAA 2024
- Diversity, Equity, Accessibility, and Inclusion (DEAI), William College 2020

Experience:

Northwestern Mutual, Manhattan, NY 2023-2024
Financial Representative.
- Founded and operated a financial advisory practice, initiating and managing client relationships with a focus on sophisticated tax efficiency, risk & estate planning, and portfolio diversification.
- Demonstrated entrepreneurial acumen by independently building a client base from scratch, showcasing strong capabilities in client acquisition, retention, consistent daily prospecting, and comprehensive financial plan building.
- Engaged in continuous professional development and networking under the mentorship of Certified Financial Planners (CFP) – trained and developed demonstrable financial expertise.

Housing Coordinator, Williamstown, MA 2019-2020
- As RA, managed residence life for 42 students, overseeing social programming, budget management, and conflict resolution with a focus on fostering a safe and inclusive environment.

Entrepreneurial | Managerial Positions at Local Businesses, Vail, CO 2015-2023
- Walkin' the Dog LLC, Resort Delivery, East West Resorts; details avail. upon request

Achievements/Skills

Notable Achievements:

Ski and Snowboard Club Vail, Vail, CO — Semi-Professional Skier and Team Leader (2012-2018)
- 9th Place U.S. Men's Junior National SG, 2018
- 3x competitor Men's US Alpine Skiing Nationals (Sugarloaf, Maine/Sun Valley, Idaho)
- Demonstrated extraordinary discipline and resilience as a semi-professional athlete.

- Mentored teammates, including present U.S. Ski Team members, helping overcome adversity and exceed limits.

Notable Skills: Entrepreneur, skilled communication, critical thinking, adaptability, team-oriented, driven, with proficiency in: Python, Adobe Photoshop, Microsoft Office (e.g. Excel, PowerPoint, Word, etc.), financial analysis.

