

Phillip E. Bollin, Certified Financial Planner™

842 W. South Boundary St.
Perrysburg, OH 43551
419-878-3934
bollinp@bgsu.edu

SUMMARY OF QUALIFICATIONS

Certified Financial Planner™

Over seventeen years of financial planning experience providing advice to individuals and business entities.

Nine years of management consulting experience working with clients in various industries across North America and Europe.

Articles published in the *Wall Street Journal*, *Toledo Business Review*, *Maumee Mirror* and *Toledo Business Journal*.

EDUCATION

Boston University, Boston, MA, Certificate in Financial Planning, 2008

The University of Michigan, Ann Arbor, MI, Master of Business Administration, 2000
Studies concentrated in Finance, Corporate Strategy and Organizational Behavior

The University of Detroit, Detroit, MI, Bachelor of Electrical Engineering, 1993

EXPERIENCE

Bowling Green State University, Adjunct Instructor Finance, Bowling Green, OH (2018 - Present)

Instructor for FIN 4130, Personal Financial Planning

University of Toledo, Adjunct Instructor Finance, Toledo, OH (2016 - 2018)

Instructor for BUAD 3040, Principles of Financial Management

Bollin Wealth Management, President, Perrysburg, OH (2004 – Present)

Founder and president of Bollin Wealth Management, a fee-only financial planning and investment advisory firm. We provide comprehensive financial planning and wealth management solutions for individuals, institutions and business entities utilizing low-cost and tax efficient investment strategies.

Zeiders Enterprises, Perrysburg, OH (2013 - Present)

Provide education and personal counseling in financial matters for active, reserve and national guard military members across the Midwest.

UBS Financial Services, Financial Advisor, Toledo, OH (2002 – 2004)

Provided investment strategies and financial plans for clients using investment products and solutions provided by UBS Financial Services.

Root Learning, Account Manager, Maumee, OH (2000 – 2002)

Led project teams working with senior leaders of Fortune 1000 companies to develop and implement strategic learning, communication and employee-alignment solutions. Clients included American Express, Citigroup, CNA Insurance, Deutsche Bank, Dresdner Bank, the Hong Kong Government, JP Morgan Chase, TransUnion and the U.K. Post Office.

McKinley Associates, Senior Project Manager, Ann Arbor, MI (1999 – 2000)

Managed IT department software and hardware implementations and upgrades for Ann Arbor based real estate investment firm.

PriceWaterhouse Coopers, Senior Consultant, Southfield, MI (1998 – 1999)

Consulted with clients in the energy industry to ensure customer-billing software systems were Y2K compliant.

Ernst & Young, Senior Consultant, Detroit, MI (1997 – 1998)

Consulted with clients in various industries on software development, testing and system implementation projects.

Electronic Data Systems, Engineering Systems Engineer, Troy, MI (1994 – 1997)

IT project manager managing systems implementations and upgrades for General Motors North American Operations' manufacturing plants and research centers.

Ingersoll Rand, Farmington Hills, MI (1993 – 1994)

Designed electrical control enclosures for OEM manufacturing components used in automotive assembly facilities.