



Alex Phillips

Financial Advisor, Robert W. Baird & Co.

Top Skills:

- Communication
- Financial Management
- Investment

Career Experience:

- Finance
- Sales

Why do you want to be a mentor?

I am looking to get involved in the Denver business community. I'd like to pay it forward, because I am convinced that the proper education young people need as far as managing money and healthy money habits is severely overlooked. I hope to help in combating the constant money stresses facing everyday Americans.

What Unique Skills or Expertise do you possess?

I hold a CFP designation which only approximately 29% of advisors in the United States hold and only 2,750 are in the state of Colorado. This designation allows me to engage in complex, comprehensive financial planning with high-net-worth individuals.

I have a background of sales internships and living in various cities such as San Francisco & Columbus, OH. This experience of being able to get out of a comfort zone and live in various environments, I feel, gives me unique perspective.

What do you like to do for fun? Any special hobbies?

I love to golf, watch college football (Go Buckeyes), and look forward to spending as much time outside as I can.