

Rick Orr

Program Manager at CUSO Financial Services, LP

Summary

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Experience

Program Manager at CUSO Financial Services, LP

June 2010 - Present (5 years 7 months)

Director at BCU Investment Advisors

February 2010 - Present (5 years 11 months)

Financial Consultant/ Retirement Planning Specialist at AXA Advisors

March 2006 - July 2010 (4 years 5 months)

Branch Office Manager at H&R Block Financial Advisors

June 1991 - March 2006 (14 years 10 months)

Skills & Expertise

Banking

Financial Services

Investments

Retirement Planning

Series 7

Finance

Risk Management

Process Improvement

Portfolio Management

Strategic Financial Planning

Financial Analysis

Leadership

Strategy

Credit

Asset Management

Strategic Planning

Mortgage Lending

Loans

Team Building

Mutual Funds

Series 63

Coaching

Microsoft Office

Financial Planning

Education

University of Missouri-Columbia

B.S., Industrial Engineering, 1983 - 1987

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