

MICHAEL S. KNIGHT, CFP®



SUMMARY

Financial Professional with diverse experience and a strong track record in financial planning, investments, housing finance and the securities brokerage industry. Active volunteer as a Court Appointed Special Advocate for children. Also served Lake County on the Winchester House Advisory Board.

PROFESSIONAL EXPERIENCE

Knight Investment Planning, October 2003 – Present

Principal and Managing Member

Launched fee-only financial planning firm to provide all clients with competent and objective advice. Knight Investment Planning provides clients with guidance in defining goals and developing strategies and a disciplined process for achieving long term success.

Consultant, Pro Bono Financial Planner, July 2002 – October 2003

Worked with clients on a pro bono basis providing financial planning help and advice. Completed coursework for a Certificate in Financial Planning at DePaul University. Successfully passed the CFP Exam and became a Certified Financial Planner™ Practitioner in September of 2003. Also provided financial planning for individuals and did extensive volunteer work.

CHARLES SCHWAB & COMPANY, December 1990 – July 2002

Executive Vice President, Retail Branch Network, 1999 - 2000

Led the Retail Branch Network in strategic initiatives and asset acquisition. Strategic initiatives included building client retention and acquisition. Reported to the President and led 400 branches and 3,000 brokers.

Assigned to Corporate Headquarters (2001 - 2002) to increase credibility of field training and relevance of corporate university.

Senior Vice President, General Manager 1994 -1999

Senior Regional Vice President responsible for implementing investment advice, asset growth, service delivery, and financial results.

Senior Vice President, Eastern Division, 1992 - 1994

Vice President, Heartland Region, 1990 - 1992

SEARS MORTGAGE CORPORATION, 1989 - 1990

Senior Vice President, Central Division

MERITOR MORTGAGE CORPORATION, 1984 - 1988
Senior Vice President

FOREMOST GUARANTY CORPORATION, 1977 - 1984
Executive Vice President, Sales and Marketing

Responsibilities included institutional sales functions and mortgaged backed securities, with personal responsibility for national accounts. Achieved a **AAA** rating by Standard & Poors.

EDUCATION/CERTIFICATION

Certified Financial Planner TM Practitioner
NAPFA-Registered Personal Financial Advisor

B. S. in Business, Graduate Studies in Marketing & Management, Wayne State University, 1974; CFP Certificate Program, DePaul University 2003