

DONALD E. BERRYMAN

15216 Swiss Ln., Truckee, CA 96161-7171

(530) 550-8739

Professional Experience

7/2007 – Present Independent Securities Consultant

4/1997 – 7/2007 **Phoenix Investment Partners**

1/2003 – 7/2007 Senior VP - Regional Wholesaler, Pacific NW

6/2000 – 1/2003 Senior VP - National Sales Manager

4/1997 – 6/2000 Senior VP - Regional Wholesaler, S. California

1/1984 - 1/1997 **Prudential Securities, Inc.**

7/1994 - 11/1996 First VP, Training Center Manager
San Diego, California

1988 - 1994 Vice President / Branch Manager
Tulsa, Oklahoma
Tucson, Arizona
Anaheim, California

1/1984 - 3/1988 Financial Advisor
Albuquerque, New Mexico

Professional Licenses & Affiliations

Certified Investment Management Analyst (CIMA®)

Certified Financial Planner (CFP®)

NASD Series 3,5,7,8,15,24,63 and 65

Arbitrator FINRA (formerly NASD)

Education and Training

BS	1974	United States Air Force Academy
MBA	1980	Abilene Christian University
	1984	Financial Advisor Training Course
CFP	1987	College for Financial Planning
	1988	Branch Office Manager Training Course
	1995-97	Securities Industry Institute, the Wharton School, University of Pennsylvania
CIMA	2000	Investment Management Consultants Association, the Wharton School, University of Pennsylvania