

ISAAC WHITE

CRD# 6135638



- Type of analytical activity: investment planner, strategic development department;
- General competence:
 - Investment management, pricing , retirement planning
 - accounts under management - 43;
 - investment portfolios in progress - 12;
 - pamm accounts - 3;
- Capital in management: \$15.8 million.

Professional Experience:

FIRM	CRD#	LOCATION	REGISTRATION DATES
FIDELITY PERSONAL AND WORKPLACE	288590	BOSTON, MA	07/13/2018 - 08/15/2019
ADVISORS			
FIDELITY BROKERAGE SERVICES LLC	7784	DURHAM, NC	12/17/2012 - 08/14/2019
STRATEGIC ADVISERS LLC	104555	DURHAM, NC	12/12/2013 - 07/13/2018

Qualification:

Regulator	Registration	Status	Date
FINRA	General Securities Representative	Approved	09/19/2019
North Carolina	Agent	Approved	09/19/2019
North Carolina	Investment Adviser Representative	Approved	09/19/2019

Examinations:

- **State Securities Law Exam**

Series 66 - Uniform Combined State Law Examination Dec 26, 2013

Series 63 - Uniform Securities Agent State Law Examination Jan 25, 2013

- **General Industry/Products Exam**

SIE - Securities Industry Essentials Examination Oct 1, 2018

Series 7 - General Securities Representative Examination Dec 14, 2012

- **Principal/Supervisory Exam**

Series 9 - General Securities Sales Supervisor - Options Module Examination Oct 20, 2014

Series 10 - General Securities Sales Supervisor - General Module Examination Sep 23, 2014