

## M. Zeke Kelly

Financial Representative  
Principal Securities Registered Representative  
Financial Advisor



*Ready to focus on your financial goals? I can help. Your goals – my focus.*

*Let's put the strategies together to work for you. Whether your priority is personal finances, your business, or both, I'm committed to helping you succeed.*

### Let's connect to get started:

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### EXPERIENCE:

Zeke wants to help his clients to believe in themselves and develop an actionable road map for success. His goal is to help them navigate the inevitable obstacles of life and help them reach their destination. Zeke gained valuable perspective throughout his military career that helps him to see adversity as a welcomed challenge, not an obstacle. During his time in the military, he was awarded the Purple Heart, Bronze Star Medals, and a total of eight Army Achievement and Commendation Awards. He also learned that he has a unique ability to apply creative solutions to complex problems. Zeke believes that it is important to recognize that the "service" in "financial services" means this is a people business above all else and he will treat his clients with the utmost respect. He serves a broad client base with personal and business planning solutions and is proud to represent a significant veteran population. His understanding of military benefits enables him to provide relevant advice that is trusted and genuine. Zeke also gives holistic business solutions due to his "one stop shop" setup. Aside from financial services, his clients are able to work with an on-site attorney and CPA for complimentary planning needs.

### EDUCATION & CREDENTIALS

- FINRA Series 7 & 66 securities registrations
- Life & Health Insurance License
- Bachelor's Degree in Finance – University of North Carolina at Wilmington

### INTERESTS:

Zeke created and leads the Brick City Champions Club, a network of business owners and leaders in Sanford, NC. He also has a strong personal and business relationship with the Boys and Girls Club of Central Carolina where he offers his time and resources to support financial literacy programs. Serving as an Ambassador for the Chamber of Commerce, he has the pleasure of working with new chamber members and collaborating with community leaders.

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