

Shannon Atkison

Bio:

I have been working for Vanguard since I graduated from NAU in 2008. Through my tenure I have held several different roles from individual contributor talking to our clients about their accounts to people and project leadership roles. Currently, I am a manager within our Advice department where I lead a team of Certified Financial Planners. I joined Vanguard because I instantly connected to the company culture, values and people. I continue to be impressed by the integrity and impact Vanguard makes with our Crew, Clients and Community.

1. When did you graduate from FCB? What was your major?
 - a. May 2008: Business Management with a minor in Spanish
2. What is your most recent accomplishment?
 - a. I recently passed the Series 65 Exam which was a FINRA requirement for my new role in our Advice department.
3. Why did you choose to work for Vanguard?
 - a. I chose Vanguard originally because I instantly connected to the people, culture and company values; which continues to be true day – 8 years later. I stay here because I know we make a difference each and every day for our clients.
4. Brief description of job/responsibilities and your title.
 - a. I am a manager within our Retail Advice Department. In this role I lead a team of Certified Financial Planners who have the responsibility of managing client portfolios and giving our clients piece of mind during in a very turbulent market environment.
5. What do you enjoy most about working at Vanguard?
 - a. The people! I work with an incredible group of people who are motivated, accountable and have fun at work.
6. What is your fondest NAU memory?
 - a. BizBlock is by far my fondest memory. I loved the intensity and energy of crafting a business plan and having the great opportunity to pitch our idea to Venture Capitalists. Through this experience I developed and enhanced my written and verbal communication, strategies for working as a team and a leader, and conceptual thinking to develop an idea from scratch and transition this into a plan that others could see and buy into.
7. Can students connect with you on LinkedIn?
 - a. Yes.
8. What are your interests and hobbies?
 - a. I love to be outdoors – hiking, running, camping, and fishing.