



Machenzie Wickre

Financial Technology Field Director

Background

With more than 20 years in the financial services industry, Wickre has broad experience in various financial technology platforms that help financial professionals create holistic retirement strategies.

Experience

- Drives sales with technology, digital advice, and financial planning software.
- Creates and develops support programs to promote use of financial technology tools and platforms to financial professionals.
- Educates financial professionals on how insurance-based products can help improve plan outcomes.
- Provides sales consulting on planning platforms such as MoneyGuidePro, eMoney Advisor, RightCapital, Riskalyze, and LifeYield Social Security+.
- Delivers sales-related, technology-focused presentations at conferences, field events, and office meetings.

→ FOCUSED ON:

- Sales ideas
- Financial planning software
- Education and adoption of insurance-based solutions within financial technology
- Retirement income strategies
- Managing risk in retirement planning
- Social Security optimization

Education, certifications, and memberships

- B.A. from Northern State University
- FINRA Series 7 and 24 securities registrations