

Lauren LaJoe Chamberlain

Sales professional with five years in financial services, a Master's in clinical ethics and She Sells training — bringing trust, empathy and results to high-ticket conversations for wellness, functional medicine and biohacking brands.

EXPERIENCE

Consultant

SEP 2019 — DEC 2020

JANUS SMALL ASSOCIATES · BEACHWOOD, OH

- Facilitated strategic planning projects centered on client vision and goals
- Developed efficient non-profit processes including segmentation, infrastructure and finances
- Aided in successful board development, fundraising and grant retrieval

Retirement Planner

OCT 2015 — JUN 2018

FIDELITY INVESTMENTS · ANN ARBOR, MI

- Exceeded 2017 fiscal year goals by 30 percent
- Worked on a team of three to strategically expand territory and increase assets under management
- Built strong relationships with University of Michigan HR executives to gain trust and support in a multi-vendor environment
- Supported University of Michigan employees through education on their retirement options
- Worked one-on-one with clients to maximize savings, determine investment mix and assess retirement preparedness
- Coordinated and presented investment education and retirement planning events and seminars

Investments Consultant

JAN 2015 — OCT 2015

FIDELITY INVESTMENTS · WESTLAKE, OH

- Worked with clients to achieve their financial, retirement and estate planning goals
- Determined investment solutions centered on client needs and risk tolerance
- Helped promote and host women's investing events to empower female clients toward confident investing and financial independence
- Mentored Junior Associates in sales strategies and client relationship management

HIGHLIGHTS

30%

Above FY 2017 goals

\$2.5M

Average monthly referrals to Senior Advisors

160

Clinical rotation hours in bioethics

STRENGTHS

Remote high-ticket closing

Consultative selling

Fact-to-emotion conversations

Health & wellness fluency

Clinical ethics & empathy

Relationship building

FOCUS

Wellness, functional medicine & biohacking offers and creators

EXPERIENCE, CONTINUED

Financial Representative

JUN 2013 — DEC 2014

FIDELITY INVESTMENTS · FAIRLAWN, OH

- Acted as sales support to uncover opportunities for Senior Advisors
- Recognized for cultivating strong leads, referring an average of \$2.5 million per month
- Maintained efficiency in a multifaceted role; fulfilled dual roles during a staffing shortage (Jan — Apr 2014)

EDUCATION

Master of Arts, Bioethics & Medical Ethics

2018 — 2019

CASE WESTERN RESERVE UNIVERSITY · CLEVELAND, OH

- Clinical Rotations — 160 hours at University Hospitals & MetroHealth
- Research Assistant, Correctional Medicine Ethics (Fall 2018 — Spring 2019)
- Facilitated a budgeting workshop at a Human Trafficking Clinic

B.B.A., Finance · Minor in Economics

2009 — 2013

CLEVELAND STATE UNIVERSITY · CLEVELAND, OH

- Cum Laude
- President, Financial Management Association (Fall 2011 — Spring 2013)
- Real Estate Finance Scholarship (Fall 2012)

PROFESSIONAL DEVELOPMENT & CERTIFICATIONS

She Sells Remote Sales Academy — Graduate

AUG 2026

SHELBY SAPP

Emotional Intelligence · Consultative Selling Skills · Fact to Emotion

FIDELITY INVESTMENTS SALES & GUIDANCE TRAINING

Communicate to Influence

DECKER COMMUNICATIONS

Series 63 & 66 Licenses

FINANCIAL INDUSTRY REGULATORY AUTHORITY (FINRA)

RECOGNITION

She Sells Graduation Certificate

08.28.2026

**Excellence in Action
— Leadership,
Execution &
Teamwork**Q1, Q2 & Q3 2014 · PEER
& MANAGER NOMINATED**"Be the Brand"**FEB & MAY 2014 · PEER
NOMINATED**Cum Laude**

CLEVELAND STATE · 2013

CONNECT

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