

News | Indices
Dow 10318.16 **-14.28** 4:31pm
Nasdaq 2146.04 **-10.78** 5:30pm
S&P 500 1091.38 **-3.52** 5:01pm

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Kelly D. Johnson

Financial Planning Specialist
Financial Advisor

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 Email Me

Welcome



My practice helps select individuals, families, and small business owners manage, preserve, and transfer their wealth.

We are committed to helping our valued clients strive to accomplish more of those things that are most important to them.

A decidedly different experience awaits you here. To learn more, please visit the "My Practice" link on my homepage.

Services

- Wealth Management
- Retirement Planning
- Financial Planning
- Asset Management
- Municipal Bonds
- Fixed Income
- Cash Management
- Lending Services
- Business Planning
- Qualified Plans
- Alternative Investments
- Long Term Care Insurance
- Education Planning

Business Experience

- **2005 - Present: Morgan Stanley Smith Barney***
Financial Planning Specialist
Financial Advisor
Rockford, IL
- **2003 - 2005: Raymond James & Associates, Inc.**
Financial Advisor
Wealth Management Specialist
Oregon, IL
- **2001 - 2003: Stillman BancCorp NA**
Vice President
Chief Operating Officer
Oregon, IL

Education and Licensing

- Wealth Management Specialist Designation
- Financial Planning Specialist Designation
- Series 7 - General Securities Representative
- Series 66 - Combined Investment Advisory Agent & Uniform State Exam
- BBA - Business Management
Evangel University
- Life, Health, Accident & Variable Annuities Insurance
Licensed

Associations

- Rock River Valley Rotary Club
President 2009-2010, Charter Member
Byron, IL
- Pinecrest Community
Board Member 2008-Present
Mt. Morris, IL
- Rockford Chamber of Commerce
Member since 2005
Rockford, IL
- Byron Area Chamber of Commerce
Member since 2003
Byron, IL

- Experienced in the Financial Services Industry since 1985

- Rock River Valley Girl Scouts Council
Board Nominating Committee 2005-Present
Rockford, IL
- Rockford Park District Foundation
2008 Beach Ball Event Co-Chair
Rockford, IL

Honors and Recognitions

- Ogle County Life Newspapers
Feature Writer, 2003 - Present
- Rockford Chamber Voice
Feature Writer, 2007 - Present
- The President's Volunteer Service Award - 2006, 2007, 2008, 2009

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