

Ernest Chisena III,
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Curriculum Vitae

EXPERIENCE

- **Oct. 2009- Present** Latitude Financial, LLC West Chester, PA

Financial Consulting Firm specializing in Investment Portfolio Management, Estate Preservation, Retirement/Investment and Business Continuity Planning. Services include the coordination of income tax and investment planning with business continuation, fringe benefit and estate planning considerations. Full service brokerage, consultation and design implementation capabilities. Non-proprietary products..
- **Sept. 1999- Oct. 2009** Medallion Investment Services Severna Park, MD

Office Supervisory Jurisdiction and branch manager for closely held broker/dealer providing investment services designed specifically for professional advisors such as accountants, attorneys and property & casualty brokers. Instituted the implementation of their planning through non-proprietary investment products. Responsible for administrative compliance, product suitability guidelines, education, and product seminars.
- **1989-1999** Wharton Equity Corporation Wayne, Pa

Registered Principal of Wharton Equity and Executive Representative to the National Association of Securities Dealers

EDUCATIONAL BACKGROUND

- **1985-1986** College for Financial Planning Denver, CO
CFP- Certified Financial Planner
- **1982-1984** Lehigh University Bethlehem, PA
Candidate for Ph.D. of Finance
- **1979-1981** Drexel University Philadelphia, PA
MBA Finance
Assistant to the Dean of Graduate Studies, Risk Management
Research, Managerial Finance Teaching Assistant, Elected Beta
Gamma Sigma Member- Honorary Business Scholastic Society
- **1974-1978** University of Pennsylvania, Wharton Philadelphia, PA
B.S Economics-Finance
Wharton Club,
University of Penn. Wrestling,
University of Penn. Sailing Team

PROFESSIONAL LICENSING

- GWN Securities Inc, -Supervising Branch Manager, Registered Representative.
- Latitude Advisors, LLC - Registered Investment Advisor Representative
- Insurance Licensing - Life, Health, Annuity and Long Term Care Programs

Contact Information

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- LinkedIn- Delta Paradigm

The undersigned hereby certifies that all information given in this document is true, complete, and correct. *Ernest Chisena III*

Securities offered through **GWN Securities, Inc.** Member FINRA & SIPC
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Investment advice offered through Latitude Advisors, LLC*
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