

RACHEL MARIE GRAHAM

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Strategic Financial Services Leader | Account Growth & Team Development | Global Business Background

Investment Adviser Representative and licensed life and health insurance professional with experience building financial-services teams, managing client relationships, leading multi-location operations, and guiding a family business through transition and sale. Active Series 6, 63, and 65 registrations. Life and health licenses in Texas, Arkansas, and Oklahoma. Completing CFP certification education requirements.

CORE STRENGTHS

Strategic Leadership • Account and Portfolio Management • Team Development and Training • Client Relationship Management • Change and Growth Management • Project Management • Financial Administration • Community Outreach • Public Speaking • Spanish, Professional Working Proficiency

PROFESSIONAL EXPERIENCE

Investment Adviser Representative, Life Insurance Professional | Shockley Insurance Agency - Bonham, TX 03/2025 - Present

- Lead account management and advisory strategy for a growing client portfolio, identifying financial needs and supporting long-term planning.
- Launched the branch financial-services division, building its strategic roadmap and hiring, training, and developing the team.
- Lead community outreach, educational seminars, and partner relationships to strengthen local engagement and sustainable growth.

Financial Professional | NYLIFE Securities - Frisco, TX 09/2022 - 03/2025

- Managed and grew client relationships, aligning investment strategies with client goals and long-term planning needs.
- Partnered with internal and external consultants and conducted quarterly and annual account reviews.

Owner | Printsbury - McKinney, TX 07/2022 - 07/2023

- Assumed strategic and operational leadership of a 35-year-old family printing business following her father's passing.
- Restructured operations, built industry partnerships, and completed a successful sale that preserved continuity for employees and clients.

District Manager and Special Projects | ALDI - Denton, TX 06/2017 - 09/2022

- Led approximately 105 employees across seven locations, using performance analysis, training, and development to improve operations.
- Supported the North Texas Instacart rollout across 96 stores through large-scale data analysis and executive presentations.
- Managed 26 full-store overnight remodels, each completed within a 48-hour window.

EDUCATION

Bachelor of Science: International Business, Economics, Finance

University of Arkansas Honors Program - Fayetteville, AR | Cum Laude, 3.83 GPA | 05/2019

REGISTRATIONS AND LICENSES

- Series 65 - active
- Series 63 - active
- Series 6 - active
- Life and Health Insurance - Texas, Arkansas, Oklahoma
- Completing CFP certification education requirements

LEADERSHIP AND COMMUNITY

- Sherman Symphony - Board Member, since 05/2026
- Sherman Chamber of Commerce - Ambassador
- Leadership Sherman - Graduate, 06/2026; class lead spokesperson
- Leadership Sherman Class of 2026 - helped share the class effort that raised more than \$20,000 to rebuild the Evergreen Life Services greenhouse
- Van Alstyne Chamber of Commerce - Member
- RBCA - Ambassador

INTERNATIONAL BACKGROUND

- Spanish - Professional Working Proficiency
- Study Abroad, Economics - Madrid, Spain
- Study Abroad, Supply Chain - Shanghai, China

ADDITIONAL

- Professional Violinist

MEDIA

KXII and KTEN, June 2026

Featured as the Leadership Sherman Class of 2026 spokesperson during the Evergreen Life Services greenhouse reveal.