



AMY [REDACTED], CHIEF FINANCIAL OFFICER

Part accountant, part real estate expert, part small-town girl, Chief Financial Officer Amy [REDACTED] brings a lot to the AE table.

A third-generation [REDACTED] resident, Amy lives two miles from the farm where she grew up. She is married to Jason, her [REDACTED] High School sweetheart, and they have two children, Brady, 11, and Samantha, 7.

The [REDACTED] family loves sports and stays active year-round. Amy coaches Samantha's softball, basketball and volleyball teams, while her husband coaches Brady in baseball, basketball and football.

Her favorite sport to coach? "Basketball," she says. "That's probably my true love."

After graduating from [REDACTED], Amy worked at a local accounting firm, CBIZ, before starting her own practice. When her CBIZ colleagues started working with Derek, David and Cody to help them start Advisors Excel, they eventually brought Amy in to help with Quickbooks, payroll and other areas.

Amy accepted a full-time position with Advisors Excel in March 2010. Though she continued to maintain her practice for a few years, she closed it last December.

"[There was] too much going on: kids, job, coaching," she says. "I just didn't want to do it anymore. I was tired of reviewing tax returns at midnight."

While she now has extra time outside of work, Amy's day-to-day role at AE certainly keeps her from twiddling her thumbs. Though her title is CFO, she also oversees all real estate and facilities.

"I like my job a lot," she says. "It challenges me every single day, and I like that. I'm a busy-type person — I don't like to sit still and be bored."

AE's culture is something that also suits Amy.

"I'm a small-town girl, so I don't think the big corporate world is for me," she says. "Family is very important to me, and I like [that it's] a big emphasis here as well."

