



**KAY C. MATSUI**

**RESUME**

August 12, 2017

**PERSONAL BACKGROUND AND EDUCATION**

████████████████████  
Language fluency in Mandarin, Taiwanese, and English. Proficient in Japanese  
Chinese Culture University Taiwan, BA in Economics with minor in Japanese

**EXPERIENCE**

CEO Marketing Director WFG, a Transamerica Financial Company,  
an Aegon Fortune 500 Company [2000 to current]  
Honolulu Board of Water Supply, member of Board of Directors [2016 to current]

**EDUCATION (Other)**

Anti-money laundering for securities and insurance, CE courses  
Ethics & Fiduciary Responsibilities, CE courses  
Supervising insurance agents and financial advisors

**LICENSES & ACCREDITATIONS**

Life and Health Insurance Licenses in HI, CA, NY, NV [20+ years to current]  
Securities Licenses: Series 6, 63, 26, 65 in HI, CA, NY, NV [1996 to current]  
Member FINRA, SIPC, and a Registered Investment Advisor –  
Transamerica Financial Group Division  
Property Casualty Insurance License in HI [2016 to current]  
Certified Financial Educator with Heartland Institute of Financial Education [current]  
Real Estate Salesperson License in Hawaii [1988 to current]  
Loan Officer License - worked for Island Mortgage & Lender [1989 to 1994]

**AWARDS**

National Award No. 1 Recruiter of the Year for WFG among a total of 20,000 insurance agents in 2011, by recruiting 690 recruits, and was recognized at the annual Convention with over 20,000 attendees.

**CLIENTS** (partlal list)

Iron Workers Local 625 – Group insurance for Long Term Care, set up a Money Manager Managed Trust Fund  
St Francis Hospital – set up group life insurance  
Various corporations - 401k and pension plans

**COMMUNITY SERVICE**

Church volunteer for various events  
Feed the Homeless on Thanksgiving Days in Waianae to hundreds of homeless people  
Room mother at Punahou and Iolani Schools when my children were students there

**REFERENCES**

[Redacted references]