



# Machenzie Wickre

## Advanced Strategies and Planning Platforms Director

### Background

With more than 20 years in the financial services industry, Wickre has broad experience in various financial technology platforms that help financial professionals create holistic retirement strategies.

### Experience

- Drives sales with technology, digital advice, and financial planning software.
- Creates and develops support programs to promote use of financial technology tools and platforms by financial professionals.
- Educates financial professionals on how insurance-based products can help improve plan outcomes.
- Provides sales consulting on planning platforms such as MoneyGuidePro, eMoney Advisor, RightCapital, Nitrogen, and LifeYield Social Security+.
- Delivers sales-related, technology-focused presentations at conferences, field events, and office meetings.

### Education, certifications, and memberships

- B.A. from Northern State University
- FINRA Series 7 and 24 securities registrations

#### → FOCUSED ON:

- Sales ideas
- Financial planning software
- Education and adoption of insurance-based solutions within financial technology
- Retirement income strategies
- Managing risk in retirement planning
- Social Security optimization

The fintech team provides education and information related to Allianz products and does not provide financial or investment advice.

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