

# WISE WALLET ACADEMY

Empowering Financial Independence Through Actionable Education

## CORE COMPETENCIES

- **Financial Literacy Education:** Development and delivery of comprehensive financial life-skills programs for students, veterans, and professionals.
- **Curriculum Development:** Specialized instructional design in business, marketing, and personal finance management.
- **Strategic Consultation:** Advisory services for mortgage planning, real estate investment strategies, and debt management.
- **Workshop Facilitation:** Scalable, service-based training modules tailored for diverse learning environments.

## DIFFERENTIATORS

- **Veteran-Owned Small Business (VOSB):** Disciplined approach rooted in military service, bringing leadership and integrity to every project.
- **Arizona CTE Certified:** Professionally certified in Career and Technical Education (Business & Marketing), ensuring high-standard instructional delivery.
- **Industry Expertise:** Over 7 years of professional experience in the finance and real estate sector as a mortgage broker and loan officer.
- **Location:** Strategically based in Queen Creek, AZ, serving the Greater Phoenix region and beyond.

## PAST PERFORMANCE

- **Wise Wallet L.L.C.:** Successfully launched the "Wise Wallet Academy" curriculum, focusing on financial literacy modules and asynchronous learning platforms.
- **Mortgage & Real Estate Services:** Managed multi-million dollar loan portfolios and provided financial advisory services for real estate acquisitions and "forced equity" investment strategies.
- **Educational Initiatives:** Developed and implemented marketing and business curriculum for K-12 and adult education settings in Arizona.

## COMPANY DATA

<b>Entity Name:</b>	Wise Wallet L.L.C.
<b>UEI:</b>	S9EFQ374BGG6
<b>CAGE Code:</b>	209S7
<b>Socio-Economic:</b>	Veteran-Owned Small Business (VOSB)
<b>Primary NAICS Codes:</b>	
<b>611430</b>	– Professional and Management Development Training (Primary)
<b>611710</b>	– Educational Support Services

**611699** – All Other Miscellaneous Schools and Instruction

**541611** – Administrative Management and General Management Consulting Services

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**Wise Wallet Academy** | Queen Creek, Arizona  
Professional Financial Education & Strategic Consulting

Active SAM.gov Registration | CAGE: 209S7 | UEI: S9EFQ374BGG6