

2017



CAMPBELL
UNIVERSITY

Lundy-Fetterman
School of Business

TRUST & WEALTH MANAGEMENT

**PERMANENT HIRE
PLACEMENT BULLETIN**

Candidate List

Please feel free to scroll through the bulletin to view all of our talented students, or click a name below to be taken directly to their bulletin listing.

William Ashburn

Melanie Beebe

William Daniel Berry

Alyssa Branson

Olivia Burley

Noah Orion Canada

Richard Carden

Abbey Cates

Jonathan Chang

Briona Chavis

Robertha Clarke

Sarah Connor

Bryan Austin Crawford

Chad Davis

Eric Eberle

Diamond English

Michael Finch

Micheala Flynn

Triston Frye

Joseph Furtick

Veronica Hammond

Ricardo Hernandez

Jennafer Hinman

Gabe Johnson

Timothy Johnson

Jack Kessel

Garrick King

Samuel Kowbel

Jordynne Kuhns

Joseph Lewis

Preston Matthews

Jordan McNeill

Ashlee Miller

Erin Mills

Jordan Monds

Matthew Mozynski

Marco Perez

Parrish Redding

Caleb Rogers

Lesley Rogers

Trevor Sheets

Will Spainhour

Scott Ethan Stewart

Brianne Van Apeldoorn

Eric Westbrook

William Ashburn



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May of 2018. Overall GPA: 3.622; Major GPA: 3.250. Dean's List, Presidential Scholarship, James M. Currin, Sr. Scholarship, Benjamin M. Hawkins Trust Education Scholarship

WORK EXPERIENCE

First Citizen's Bank and Trust Company, Institutional Trust Intern Summer 2016. Gained exposure to software systems such as TrustDesk, OnBase, Capital Base, and Money Guide Pro. Projects included pre-audit preparation, deferred business handling, restructuring the investment coding for the investment managers, and automating the advisor account review process.

First Citizen's Bank and Trust Company, High Net Worth Intern Summer 2017. First ever intern in the High Net Worth Department. Gained exposure to Maxx loan platform, IBM Cognos, and EnvestNet. Improved data accessibility and integrity for the entire Wealth Management division. Each summer I gave a twenty-minute presentation to the entire Wealth Management team as well as the Vice Chairman. Developed professional and interpersonal skills in a real-world banking environment.

Camos Brother's Pizza and Lincoln Brewery, Employee January 2016-May 2016. Began as a delivery driver, was promoted to cashier and food preparer and was given a raise within two weeks. Took on many responsibilities of a manager including reconciling each day's revenues, handling customer dissatisfaction, building relationships with customers, and keeping track of the restaurants supplies.

Southeastern Trust School, Student Assistant. Assisted the director with the planning, execution and delivery of the Southeastern Trust School. Attended meetings and assisted other faculty and staff with the operations of the Trust School.

Gravel Groomers, LLC., Franchise Owner-Operator June 2012-Present. My franchise led the company in sales in 2014. Developed marketing strategies and materials. Follow up on inquiries included receiving calls, meeting the customer to give a quote, and negotiating a final price for each job. Created an optimal pricing strategy that was adopted by other franchises. Negotiated a lower franchise fee based upon my outstanding sales record. Effectively managed a small crew

and several customer accounts. Completed jobs in a timely manner and reconciled revenues to the corporate office in Peoria, IL.

EXTRACURRICULAR ACTIVITIES

Kappa Sigma: Sigma-Phi Chapter Founding Father, Military Heroes Fundraiser, Highway Clean Up, Campus Outreach, Adam Smith Club, Outdoors Club, Intramural Softball, 2012 Connecticut Boy's State Delegate

Melanie Beebe



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust & Wealth Management, Minor in Financial Planning. Expected Date of Graduation: May 2018. Overall GPA: 3.908. Graduate GPA: 3.75 Dean's List, Presidents List, Presidential Transfer Scholarship, Wells Fargo Undergraduate Trust And Wealth Management Scholarship, Moen Incorporated Scholarship, Myrick, Doris P & Ray L Business Scholarship, Ball, Ned B Business Scholarship.

EXPERIENCE

Wells Fargo, Minneapolis, Minnesota, Trust Administrator 1 – Intern, June 2017- August 2018. Assisted in day to day administration and maintenance of accounts. Completed Gifting Paperwork, Annual Account Reviews, DARS, New Account Checklists, and Account Closings. Worked closely with the field to ensure client requests were

processed efficiently and effectively. Became proficient in programs including SEI wealth platform, imaging software, Task Management Tool, Trust Money Movement, Trust Gateway and Client Initiated Money Movement (CIMM).

Wells Fargo, Philadelphia, Pennsylvania, Trust Administrator 1- Intern, June 2016-August 2016. Reviewed and understood key paragraphs within a trust document, including distribution clauses, optional termination, fees, multiple co-trustees and investment clauses. Prepared Small Trust Termination Memos for those trusts closing under document or state statute. Shadowed Investments, Tax, and FITT to understand their responsibilities and processes. Had exposure to Discretionary Action Requests and Annual Account Reviews. Campbell University Student Services, Buies Creek, North Carolina, Student Tutor, August 2015 – May 2016. Used creative problem solving to find the best ways to study and understand material and encouraged kids to gain motivation to achieve academic skills. Kids Castle, Barrington, New Jersey, Teacher, May 2015-May 2016. Provided care and learning experiences for children. Peach Country Tractor, Inc., Mullica Hill, New Jersey, Customer Service Representative, Spring 2014 – Summer 2015. Create positive interactions between clients and Peach Country, both in person and on the phone, facilitating transactions of various agricultural products and services, while creating a relationship of trust and loyalty. Regal Entertainment Group, Washington Township, New Jersey, Floor Staff, Summer 2014. Worked at two different theaters primarily in the concession stand taking customers orders, preparing food, and keeping the stand clean at all times. Additionally responsible for cleaning theaters on busy nights and assisting other coworkers in floor staff positions to ensure the theater runs smoothly. Hibachi Grill & Supreme Buffet,

Glassboro, New Jersey, Hostess, Summer 2013. Created a positive environment for customers as they entered the restaurant and seated them upon their arrival.

EXTRACURRICULAR ACTIVITIES

Gilbert T. Stephenson Trust Club. Volunteer for 4H fair in local counties providing positive, clean experiences for guests. Member of Delta Mu Delta.

William Daniel Berry



EDUCATION

Campbell University, BBA in Trust and Wealth Management; Minor in Financial Planning: Expected date of graduation: May 2018; Cumulative GPA: 3.5. Phi Eta Sigma Honor Society, President's List, Presidential Scholarship, Southeastern Trust School Trust Management Scholarship, Fetterman, Lewis M & Annabelle L Business Scholarship. Mulkey, Edith C & Raymond L Jr. Scholarship, Byrd, Major Sam Trust Education Scholarship.

WORK EXPERIENCE

Modern Woodman of America, Cary, North Carolina, Summer 2017. Established skills such as developing Favorable Introductions and techniques for approaching prospective clients. Gained product knowledge of Investment and Insurance Vehicles. Examined client financial situations to determine their best fiscal course of action. Demonstrated and practiced effective workplace communication and professionalism skills.

Completed service projects in the Cary community, such as highway beautification, delivering doughnuts to Cary Police Officers, and water painting with patients at Brookdale Senior Living Solutions. Tidewater Agronomics Incorporated, Belvidere, North Carolina, Summer 2015-2017 Seasons. Responsible for the location and notification of disease and other detrimental issues facing crops in my designated area. Analyzed crops for impurities and differences throughout set trial dates. Responsible for the collection and documentation of data from select trials and grower's fields. Collaborated in a group setting while utilizing problem solving skills to accomplish day to day task at our research farm. Prepared chemicals to be sprayed in the designated test areas. Aided in the construction of new test plots, and trials, as well as the upkeep of the work environment. Delivered shipments of dry ice and other supplies to the business as needed. Buies Creek Astros, Buies Creek, North Carolina, Spring 2017. Accountable for proper seating and distribution of stadium patrons. Assisted visitors and answered questions to enhance the ballpark fan experience.

EXTRACURRICULAR ACTIVITIES

Gilbert T. Stephenson Trust Club Vice President (Former Parliamentarian), Campbell University Investments Club, Campbell University College Republicans, Campbell University Intramural Sports, Campbell University Relay for Life, Hertford Baptist Church Member.

Alyssa Branson



EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-Law: Expected date of graduation: May 2018. Overall GPA 3.167 Major GPA 3.00. Major Sam Byrd Trust Education Scholarship, Scott Ellis Scholarship.

WORK EXPERIENCE

Work at Food Lion as a cash office assistant/ vendor receiver, 2012- current. Count all of the cash in the safe and record it as each shift begins and ends. Manage the front end of the store, including but not limited to, the cashiers, all operations that take place on the front end, and cash in the store. Assist cashiers with transactions. Loan out, or pick up money from the cash registers. Perform service desk tasks, which typically include large amounts of money. Handle the morning cash and check deposits, and prepare the deposit bag for transferring to the bank. Check in vendors while

accounting for the products they bring into the store.

EXTRACURRICULAR ACTIVITIES

Volunteered spare time to help raise money for Duke Children's Hospital and Health Center. Assisted with raising money and collecting food for the local food banks. Volunteered for Paw Love, to help raise money for abandoned animals. Becoming a member of Fellowship Baptist Church.

Olivia Burley



EDUCATION

Campbell University, BBA in Trust and Wealth Management. Expected date of Graduation: May 2018; Overall GPA: 3.16; Major GPA: 3.5. Dean's List. Phi Eta Sigma Honor Society. Campbell University Presidential Scholarship, North Carolina Baptist Scholarship, Dr. Ernest Paskel Sauls Business Scholarship, Ned B. Ball Business Scholarship.

WORK EXPERIENCE

Ted's Charcoal Steakhouse, Clinton, NC, December 2012 to Present. Interact with customers to provide an exceptional level of service. Perform multiple tasks at once, under heavy time constraints. Work well with co-workers to help restaurant run smoothly. Campbell University, Delta Phi Epsilon Sorority, Vice President of Operations, November 2015 to April 2017. Created and maintained sorority budget for the school year. Handled cash and checks. Responsible for sorority debit card. Scheduled dues and other fees to be billed to

members every semester. Organized effective payment plans that helped members pay dues and other fees on time. Supervised seven coordinator positions and conducted weekly meetings with them. Responsible for the day to day operations of the sorority.

EXTRACURRICULAR ACTIVITIES

Phi Eta Sigma National Honor Society (President, Treasurer). Delta Phi Epsilon Sorority (Vice President of Operations, Director of Finance). Baptist Campus Ministry. Volunteered in Operation In As Much, Operation Christmas Child at Campbell University, and at Buies Creek Elementary School.

Noah Orion Canada



EDUCATION

Campbell University, BBA Trust and Wealth Management Pre-Law, Expected date of graduation: May 2018. GPA: 3.39. Scott-Ellis Scholarship. Grace White & Gilbert Thomas Stephenson Scholarship Certificates: Blue Coat Certified ProxySG Security Administrator, Cisco Certified Network Associate – Security (CCNA Security), Cisco Certified Network Associate Voice (CCNA Voice), Cisco Certified Network Associate Routing & Switching (CCNA-RS), CompTIA Healthcare IT Technician, CompTIA Network +, CompTIA Security + Security Clearance: Active Top Secret Clearance / SCI with Counterintelligence (CI) Polygraph

WORK EXPERIENCE

Transport Network Control Center (Secure Data/Voice Communications), October 2015-present. Administer network security on routers and

switches for various intelligence-gathering data & voice networks, both non-secure and secured platforms, for optimal performance according to military and other government agency (OGA) policies. Install, maintain, and monitor all network components to include: Cisco routers/switches, Cisco Call Managers – Voice over Internet Protocol (VoIP), Juniper routers, Remedy ticketing system. Respond to hardware and software problems to ensure 99.9% uptime for over 300 remote user sites. Defense Red Switch Network Project (Secure Voice Communications), May 2006 – May 2015. Configured and sustained voice transmission systems and data circuitry components, globally, for overt and covert communications; supporting operations for Secretary of Defense, Secretary of State, Joint Chiefs of Staff (Pentagon), 18th Airborne Corps Commanding General (Fort Bragg, NC) & United States Army Central Command (Camp Arifjan, Kuwait). Project Manager/Facilities Manager (Secured Operations Facility). Oversaw initial concept and construction of secure operations facility. Provided Tier 1 level support of CWE (Common Workgroup Environment) and secure Avaya telephone systems.

EXTRACURRICULAR ACTIVITIES

Contributing Reporter to The Campbell Times.

Richard Carden



EDUCATION

Campbell University; BBA in Trust and wealth management. Expected graduation date May of 2018. Scott Ellis scholarship, Administrative housing scholarship, RA housing scholarship, Dr. Ernest Paskel Business Scholarship and The Ball, Ned B Business Scholarship .

WORK EXPERIENCE

Wells Fargo, Wealth and Investment Trust Intern June 2017- August 2017. Assisted a Fiduciary management team with a small trust closing project. Reviewed over 20 uneconomical trust accounts for an early termination. Analyzed trust documents to ensure that all beneficiaries received proper distributions. Utilized software's such as SEI, Navigator, Trust Image view, and Client Link to conduct a thorough review of trust accounts. Responsible for drafting letters to beneficiaries about account updates. Provided operational support

to fiduciary management teams as needed. First Citizens Bank April 2015 –August 2016. Performed basic teller transactions such as processing deposits for clients, examining checks for proper endorsements, and verifying funds. Responsible for a cash drawer of up to \$10,000. Answered any questions that clients had with their accounts, and provided account maintenance such as ordering debit cards, conducting stop payments and assisting clients with online banking technology. Assisted the financial sales manager with bank campaigns such as quarterly bank promotions. Contributed to the branch sales goals by identifying sales goals while processing clients and referred them to the financial sales manager. Floated to nine different banks in the region when needed. Campbell University, Residence Life May 2015 –Present. Foster and facilitate building a community within the residence hall. Work directly with freshman males to ensure that they have a positive and safe first year experience. Provided academic and personal counseling to residents. Planned and marketed residence hall programs and events that were centered on the themes of physical activity, emotional support, spiritual events, intellectual programs and social activities. Enforced university student code of conduct and guidelines and followed appropriate protocol if rules were violated. Provided support and answered questions to parents of residence if needed. Served as a direct assistant to the hall residence director and received delegated task. Campbell University, Office of First Year Experience. March 2016-Present. Co-instructed a freshman seminar course along with a university professor. Planned weekly lesson plans that would assist first year students to become college oriented. Provided academic and personal support in and outside the classroom. Assisted the assistant vice president for student success with required first year forms for the course. Campbell University Athletics, Marketing and Promotions. September 2014- August 2016. Directly assisted the associate

athletic director with marketing and game day promotions. Strategized and plan game promotions that would improve student and community attendance. Promoted athletic programs such as the camel kids club and accepted and recorded payments for such programs. Provided assistance to game day patrons and ensured that they had an enjoyable experience at athletic events.

EXTRACURRICULAR ACTIVITIES

Campbell University Admission Ambassador, Business School Admission team, Camel Crazies student spirit club (Founding President), Small group Bible study, and intramural sports

Abbey Cates



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2018. Overall GPA: 3.521. Major GPA: 3.786. Dean's List, Presidential Scholarship, Phi Eta Sigma Honors Society, Golden Leaf Foundation Scholarship, Southeastern Trust School Trust Management Scholarship, Mary Paschal Scholarship, Ruby Bailey Byrd Scholarship.

EXPERIENCE

First Citizens, Raleigh, North Carolina, Wealth Planning Intern, Summer 2017. Created user guides for financial planning software to increase implementation. Published articles on various planning topics to the company's intranet. Prepared and presented financial literacy courses to Durham mission groups for low income individuals. Assisted associates with data entry for client financial plans.

Polo Ralph Lauren Factory Store, Smithfield, North Carolina, Sales Associate, Jan 2016-June 2017. Educated associates about women's and accessory business and weekly sales. Inspired and motivated associates to sell women's key item of the week. Provided personalized care based on individual customer shopping needs. Collected and entered customer information into online registry system. Appropriately assembled interior store displays to market merchandise from each collection. SunTrust, Atlanta, Georgia, Wealth Intern, Summer 2016. Analyzed trust agreements and provided feedback on document provisions. Compiled and prepared all necessary documentation for client monetary requests. Presented discretionary distribution requests to Action Committee for approval. Conducted research to locate clients' new domiciles and outstanding policies. Completed annual account reviews on online Reg9 system. Diesel Equipment Company, Greensboro, North Carolina, Accounting Department Intern, Summer 2015. Audited daily internal invoices and scanned into online filing system. Input new customer data into online records. Approved and file tax exemption forms for new customers. Edited parts sales pricing according to changes in cost. Maintained up-to-date record keeping for all government bids.

EXTRACURRICULAR ACTIVITIES

Graduate Assistant for the Office of Annual Giving at Campbell University, Founding Sister and Vice President of Operations for the Gamma Upsilon Chapter of the Delta Phi Epsilon Sorority, Campbell University 2014 Orientation Leader, Campbell University Relay for Life, Campbell University Intramural Volleyball.

Jonathan Chang



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected Date of Graduation: May 2018. Overall GPA 3.297; Major GPA 3.750. Scott-Ellis Scholarship. Southeastern Trust School Trust Management Scholarship.

WORK EXPERIENCE

Schlotzsky's Deli, Sales Driver, Fayetteville, North Carolina, July 2015-May 2017. Duties performed: provided exemplary customer service to all patrons, ensured complete customer satisfaction, conducted all cash and credit transactions in a quick and efficient manner, calculated and recorded revenues, served customers accordingly, reviewed and replenished inventory as needed, maintained organization of work area, trained and educated new employees. Better2Vape, Mixologist, Fayetteville, North Carolina, April 2014-June 2015. Duties performed: prepared

meticulous blends of various orders, created new and innovative recipes and designs, followed finely detailed instructions according to the customer's request, merchandised and educated consumers on various in-store products, informed and advised new customers unfamiliar with the merchandise.

EXTRACURRICULAR ACTIVITIES

Korean Presbyterian Church of Fayetteville Worship Leader, Volunteer at the Fayetteville Police Training Center, Fayetteville Animal Shelter Volunteer, Second Harvest Food Bank Volunteer

Briona Chavis



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected Graduation Date is May 2018.

WORK EXPERIENCE

Tab's Love and Care overnight nurse, Clayton, NC, May 2017 – August 2017. Responsibilities included assisting elderly client with daily activities such as; walking, eating, and bathing. Prepared meals for the client and family daily. Maintained a professional relationship with the client's family. Created ideas to make client more comfortable. Provided emotional support with family after passing of the client. Piggly Wiggly, Wilson, NC, May 2013- July 2017 cashier and shelf stocker (summer only). Duties included gathering packages to organize shelves. Instructed trainees how to operate cash register, also informed them of company policies. Counted money to ensure accuracy at the end of each shift.

Campbell University, campus recreation referee, Buies Creek, NC, October 2015-Present. Duties include: attending training programs, refereeing basketball, handball, and soccer. Campbell University, campus recreation attendant August 2017- Present. Operate software for entry of facilities.

EXTRACURRICULAR ACTIVITIES

Social Entrepreneurship Club participant, Women's Club Basketball participant, Campbell University Campus Worship drummer, Campbell University Gospel Choir drummer, Lundy Fetterman Trust Club, Elm City Elementary Volunteer, Campbell University intramural sports

Robertha Clarke



EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning. Expected Date of Graduation: May 2018. Major GPA: 3.5; Scott-Ellis Scholarship, Shouse James M & Alice Pruitt Scholarship, Administrative On campus Housing Scholarship.

WORK EXPERIENCE

Shadowed Amber Aughtry-Lindsay, a Financial Representative at Modern Woodmen of America in Lillington, North Carolina: August 2017-Present; responsibilities included evaluating client's current financial standing, and helping Mrs. Lindsay develop personal financial plans for her clients. Provided insight on client's goals, objective, and financial situation. Attended client meetings to review and adjust their plan over time. Intern at Keith and Associates Law Firm in Greensboro, North Carolina: June 2016-July 2016; Assisted attorneys with case files/information,

researched cases, organize legal documents, sat through various trials, shadowed attorneys in client meetings, maintained communication with clients during the duration of their case. Sales Associate, Foot Locker, Greensboro, North Carolina: July 2013-Present. Responsibilities includes handling cash/credit transaction, driving sales by suggesting and showing product, organizing stock room according to size and type, provides customer service by identifying and attending to their needs, maintaining a clean and friendly work environment. Burlington Coat Factory, Sales Associate, Greensboro, North Carolina: July 2016-2017. Responsibilities includes communicating with customers to ensure a great shopping experience, answering inquiries about merchandise and store policies, handling monetary exchange transactions, and awareness of promotions and advertisements.

EXTRACURRICULAR ACTIVITIES

Gilbert T. Stephenson Trust Club, Social Entrepreneurship Club, Campus Activity Board, Volunteer for Habitat for Humanity, Burrito Bikers, and youth advisor for House of Prayer International.

Sarah Connor



EDUCATION

Campbell University, Masters of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2018; GPA: 3.904. Major GPA: 4.0. President's List, Dean's List, Scott-Ellis Scholarship, Nexans Scholarship, Southeastern Trust School Trust Management Scholarship, BB&T Scholars Direct Aid Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, Dr. Ernest Paskel Saul's Business Scholarship.

WORK EXPERIENCE

Wells Fargo, WIM Intern. (June 2017- August 2017). Minneapolis, MN. Responsibilities include evaluating and approving discretionary distributions, exploring and completing annual account reviews to ensure the account was set up properly, reviewing overdrafts on accounts and transferring money

within accounts to cover overdraft or reviewing memo ticklers to prevent overdrafts, requesting and approving money movements through TMM and CIMM, reviewing Trust documents to gain an understanding to give explanations to clients, exploring with different departments within WIM including Relationship Managers, Estate Planning, Special Needs Trust, RM Associates, and Investment Specialists and completing correspondence. Wells Fargo, WIM Intern. (June 2016- August 2016 Philadelphia, PA. Responsibilities include evaluating small Trusts for feasibility, assessing the document(s), locating small Trust clause, identifying the beneficiaries and the percentage of the Trust they will receive, verifying the information in the system was consistent with the document, preparing and executing an authorization termination form, compiling all the necessary documentation to terminate the Trust, explored with senior management applicable areas including tax, investments and FITT to solidify comprehension in these areas, exploring with Trust Administrators daily roles including DARS, KYC's, and AAR's and completing correspondence. Campbell University, College of Pharmacy and Health Sciences Graduate Assistant. (May 2016- Present) Responsibilities include providing assistance in planning events, reviewing scholarship entries and score based on qualifying criteria, blinding scholarship applications to avoid biased scoring, providing assistance in planning events and assisting in scheduling work hours for tutors, receiving, combining and sending weekly announcements to students, faculty and staff and monitoring and inputting attendance for the Dean's Scholarship Renewal. Modern Woodman of America, Cary, North Carolina, Intern. (April 2015- August 2015) Responsibilities include meeting with potential clients and explaining benefits, cold calling, managing a LinkedIn page, and assisting with marketing and promoting of Modern Woodman. Peebles, Sales Associate, Lillington, North Carolina. (May 2015- Present)

Responsibilities include providing personal and quality service for each customer, processing sales transactions and returns in a timely manner, maintaining neat dressing rooms and storefront appearances, closing and balancing all sales transactions at the close of business days, and meeting and exceeding daily goals of controllables. Performance Sports Center/ Angier Gymnastics, Assistant Head Gymnastics Coach. (August 2011-May 2015) Responsibilities include designing age and skill appropriate gymnastics class curriculum for ages 5-18, monitoring and assessing personal goal achievements and progress for each gymnast over the course of each season, developing specific strategies for student's individual areas of challenges to enhance personal performances, regularly communicating with the parents on their child's progression, processing and accepting payments and maintenance of accounts, accompanying and coaching gymnasts at local and state competition meets, and researching new drills to enhance the development of competition team students. Campbell University, Scholastic Aptitude Test (SAT), Proctor. (April 2014- Present) Responsibilities include administering tests within the specified guidelines as directed by the testing agency, presenting directions in a clear and logical manner, supervising test-takers to insure they maintain ethical test taking standards, and prior to test distribution, make announcements, provide encouragement and be available for questions.

EXTRACURRICULAR ACTIVITIES

Lundy Fetterman School of Business Student Mentor, Gilbert T. Stephenson Trust Club, Accounting Club, Marketing Club, Christian Business Initiative Club, Campbell University Relay for Life, Phi Eta Sigma Honor Society, Delta Mu Delta Honor Society, Freshman Move-In Day volunteer, Community Christmas Store volunteer, Operation Inasmuch volunteer.

Bryan Austin Crawford



EDUCATION

Campbell University, Masters in Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2018; Graduate GPA: 3.25 Undergraduate GPA: 3.459. Dean's List, Presidential Scholarship, North Carolina Baptist Scholarship, James W. Narron and C. Gray Johnsey Trust Scholarship. Gordon Rowland Trust Scholarship. South Eastern Trust School Trust Management Scholarship.

WORK EXPERIENCE

O'reilly Auto Parts Hope Mills, NC, May 2017-Present. Parts and customer service specialist. Responsibilities include customer service and satisfaction, meeting customer expectations, computer based research, technical and automotive knowledge. Mid-South Wrecker and Auto- Salvage, Fayetteville, NC, May- August 2016.

Responsibilities included disassembling and inventorying parts listed for resale. Rod Renfrew Appraisals, Lillington, NC, July 2015-Present. Responsibilities include the demolition and renovation of a repossessed home while supervising other employees, re-wiring electrical systems, building framework, hanging sheet rock, painting, laying carpet, installing ductwork and insulation. Mid-South Wrecker Service and Auto- Salvage, Fayetteville, NC, May 2014-July 2014. Responsibilities included money collection and handling of \$5,000+. Mid-South Transmission Service, Fayetteville, NC, May 2013-Present. Responsibilities include mechanical repairs, body work, and detailing of vehicles in preparation for sale.

EXTRACURRICULAR ACTIVITIES

Founding Secretary of the re-chartered Gilbert T. Stephenson Trust Club, Campbell University Student Government Association- Junior Class Secretary/Treasurer, Campbell University College Republicans, Campbell University Relay for Life.

Chad Davis



EDUCATION

Campbell University, Master of Business Administration; BBA in Trust and Wealth Management Pre-Law; Minor in Financial Planning. Expected Date of Graduation: May 2018. Major GPA: 3.76. President's List. Dean's List. Presidential Scholarship. Southeastern Trust School Trust Management Scholarship. Gordon B Rowland Trust Scholarship. BB&T Scholars Program.

WORK EXPERIENCE

Peoples United Bank, Wealth Management Intern, Bridgeport, CT, May 2017-August 2017. Operated systems including Trust Desk, Wealth Station, Bloomberg and Sales Force. Analyzed asset class history to calculate average returns, risks, and correlations using Bloomberg software. Reviewed Investment Policy Statements to orchestrate RFP responses, client presentations and semi-annual reviews. Assisted with Reg 9 reviews and IRA

disbursement requests. Researched KYC and SOW information relating to Private Banking clients. Organized RFP outcome statistics for the institutional team. Wells Fargo, Project Coordinator, Wilmington, NC, June 2016- August 2016. Assisted Operational Risk Consultant with the AML-KYC Project. Operated and became familiar with systems such as SEI, Client Link, FileNet, Trust Gateway, Trust Imageview and KYC Maintenance. Assisted team members by reviewing, researching and updating KYC records and client profiles. Southern Wayne High School, Head Swim Coach and Manager, Dudley, NC, October 2013- February 2016. Supervised and educated a team of 10-15 high school students. Prepared rules and regulations for the team. Conducted a meeting to provide communication with parents and guardians. Managed the school's swim team budget. Attended regional meetings to set practice times and the swim meet schedule. Operated meet entries through an electronic database. Prepared and conducted an award presentation for swimmers. Southern Wayne Country Club, Lifeguard, 2013-2014. Attended and passed Lifeguard and First Aid training. Learned and maintained the necessities to keep a pool and its water at correct levels to ensure safety. Opened and closed the facility by laying out facility equipment as need be. Communicated with members to ensure safety and satisfaction.

EXTRACURRICULAR ACTIVITIES

Lundy-Fetterman School of Business Student Mentor, Lundy- Fetterman School of Business Admissions Team, Gilbert T. Stephenson Trust Club, Finance and Investing Club, Math-ITS Club, Campbell University Club Swimming

Eric Eberle



EDUCATION

Campbell University, Masters of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2018; Overall GPA: 3.761. Major GPA: 3.75. President's List, Dean's List. Scott-Ellis Scholarship, Carlton & Lynell Martin Business Scholarship.

WORK EXPERIENCE:

Campbell University, Resident Assistant (Buies Creek, NC), August 2016-Present. Interact with students on a daily basis assisting with any issues while ensuring all rules and policies are followed providing a safe and encouraging living environment. Manage facility maintenance/upkeep. Design, organize, and implement programs aimed at encouraging resident engagement and interaction. Charter Express, Inc. Ramp Agent (Morrisville, NC),

May-August 2016. Supported all ground functions including baggage and cargo handling, aircraft dispatching and miscellaneous assignments at Raleigh International Airport. Ensured compliance with all safety and personnel protocols established by RDU Airport Authority. Provided exceptional customer and intercompany service. Campbell University, Tutoring Center Staff and Peer Tutor (Buies Creek, NC), August 2014-April 2016. Tutored students in one-on-one and small groups to assist their understanding of a variety of subjects including Economics, Statistics, Algebra, Western Civilization, and Environmental Science. Lundy-Fetterman School of Business, Peer Mentor (Buies Creek, NC), August 2015 - April 2016. Provided support, peer education, and guidance to incoming class assisting with transition to college. SubZero Ice Cream & Frozen Yogurt, Assistant Manager (Holly Springs, NC), Summer 2015. Assisted in new store opening. Managed FOH and BOH operations including staff supervision, customer service, product and inventory control. Responsible for point of service sales and cash handling.

EXTRACURRICULAR ACTIVITIES:

Campbell University Investment Club, Chief Compliance Officer, Spring 2016. Campbell University Campus Volunteer.

Diamond English



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2018. Scott Ellis Scholarship.

WORK EXPERIENCE

Intern, The Law Offices of Karen Donaldson PLLC, Cary, NC, August 2017- Present. Assisted attorney's and paralegal with estate planning for clients, creating custom trust accounts for clients, updating client wills, reviewing deeds of trust, prepared and analyzed documents for client real estate closings, scheduling and attending meetings, and provided assistance to client inquiries. Administrator, G&M Mortgages Unlimited, Cary, NC, June 2016- Present. Responsibilities included preparing income and expense statements for accounts, analyzing clients current financial standing, organizing and maintaining filing systems, scheduling and attending meetings, and creating agendas. Shift manager, Wendy's,

Wilmington, NC, June 2013-2016. Responsibilities include performing cash/credit transactions, directing staff members into new shift plans, preparing product and inventory to open store, assisting customers with any concerns to ensure a great experience, participating in the upkeep of the store, and solely managed a crew of four until next shift manager arrived. Proficient time management skills.

EXTRACURRICULAR ACTIVITIES

Volunteer Youth Group Advisor for Guiding Light Ministries. Member of Gilbert T. Stephenson Trust Club. Member of Campbell University Black Student Association (BSA).

Michael Finch



EDUCATION

Campbell University, Master of Business Administration; BBA in Trust and Wealth Management; Minor in Financial Planning; Expected date of graduation: May 2018; GPA: 3.091. Major GPA: 3.250.

WORK EXPERIENCE

Food Lion, Lillington, NC April 2016-present. Executed hundreds of transactions daily, Placed in charge of supervising my co-workers. County Seat, Lillington, NC November 2015-February 2016. Responsibilities include greeting patrons and seated them in a timely fashion, performed daily reconciliation of cash and credit card payments, provided excellent customer service, open and closed the restaurant. Beef O' Brady's, Fuquay-Varina, NC, August 2015-November 2015. Server, responsibilities include opening and closing the restaurant, handling cash every day, customer

service one on one with many different people. Black River Paintball, Angier, NC, January 2014-May 2014. Paintball referee, responsibilities included managing paintball games, handling disputes, running the entire rental shop, cleaning up and closing at the end of the day. Publix Supermarket, Wesley Chapel, FL, March 2012-August 2013. Cashier and bagger, responsibilities included customer service which was the number one priority at Publix, was responsible for large amounts of money, opening and closing the store. Walt Disney World, Orlando, FL, November 2010-Present. Soccer referee, responsibilities include managing soccer games both solo and in charge of two other referees, reporting games on time, managing disgruntle parents, managing altercations that arise with players and parents. Wesley Chapel Athletic Association (WCAA), Wesley Chapel, FL, August 2008-Present. Soccer referee, responsibilities include managing soccer games, organizing the daily schedule, training new referees, managing upset parents and coaches.

EXTRACURRICULAR ACTIVITIES

Founding Treasurer of the re-chartered Gilbert T. Stephenson Trust Club, HPH Hospice's three-day summer grief camp volunteer/camp organizer, HPH Hospice's one day summer grief camp volunteer, Campbell University Campus Activities Board (small events committee), Campbell University Presidential Scholars Club, Campbell University College Republicans, Campbell University Relay for Life

Micheala Flynn



EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning. Expected Date of graduation: May 2018. Major GPA 3.0. Scott Ellis Scholarship, Administrative House Scholarship, Hope Scholarship.

WORK EXPERIENCE

Aramark cashier 2014-Present. Assisted with up to 200 customers per shift. Delegate tasks to junior employees on rotational basis. Replenish stock inventory on an as-needed basis. Responsible for cash and receipts accountability with occasional bank deposits. Coordinates with vendors for stock orders and deliveries.

EXTRACURRICULAR ACTIVITIES

Common Ground Treasurer (2015-2016), Vice President (2016-2017), President (2017- Current). Event coordinator with “Our Place at the Table” program. Volunteer for Campbell University Relay for Life and Operation Christmas Child.

Triston Frye



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of Graduation: May 2018.

WORK EXPERIENCE

Landscape Specialist at Mow Joe Landscaping in Lillington NC, May-July 2016. Worked with a team to provide professional lawn care to members of the local community in a timely fashion. Auto bell Carwash in Charlotte NC, April-June 2014

EXTRACURRICULAR ACTIVITIES

Member of the Campbell University Football team, Over 30 hours of community service with the Campbell University Football team which includes, delivering food to families, fellowship with local youth, and various projects to clean up around campus. When not playing football and volunteering in the community. I am an avid angler.

Joseph Furtick



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust & Wealth Management, Minor in financial planning. Expected date of graduation May 2018. Overall GPA 3.6. Dean's List (2013-2017).

WORK EXPERIENCE

Campbell University, Graduate Assistant (Buies Creek, NC) March 2017 – Current. Assist with creating, distributing, and grading student examinations in ExamSoft. Utilize accounting, marketing and excel skills to aid pharmacy school students in completion of mock business plans. Wells Fargo, Intern (Miami, FL) June 2017 – August 2017. Collaborated with team associates to open new international client accounts. Assigned and completed various projects related to Specialized Wealth Services. Shadowed client specialists and investment managers on a daily basis.

Wells Fargo, Summer Project Analyst (Wilmington, NC) June – August 2016. Gained proficiency in financial systems such as Trust Gateway, Navigator, SEI and ClientLink. Researched and searched for documents in Trust Gateway and Imageview to verify and collect information for numerous KYC accounts. Reviewed trust, IRA, and agency accounts for multiple markets to ensure all necessary information was gathered and complied with federal regulations. Actively communicated with Relationship Managers to acquire any necessary information for various accounts. Shadowed Relationship managers and observed their day to day operations. Autobell Carwash, Crew Member (Garner, NC) June 2015 – November 2015. Utilized teamwork and leadership skills to ensure customer satisfaction. Communicated in English and Spanish with employees and clients. Washed and detailed various forms of cars to client specifications. College Hunks Moving & Junk, Moving Crew Member (Raleigh, NC) May – August 2014. Assisted clients in moving locations and managing inventory. Maintained team environment to improve efficiency & prevent injury or damage to property. Taught new team members new company procedure. Maintained company fleet.

EXTRACURRICULAR ACTIVITIES

Finance and Investment club and Social Entrepreneurship member. BFA afterschool tutor. Harnett County Animal Shelter volunteer.

Veronica Hammond



EDUCATION

Campbell University, Master of Business Administration; BBA in Trust & Wealth Management; Minor in Financial Planning. Expected Date of Graduation: May 2018. Overall GPA: 3.847. MBA GPA: 4.0. Major GPA: 3.917. President's List, Dean's List, Presidential Scholarship, Campbell University Alumni Association Scholarship.

WORK EXPERIENCE

Wells Fargo Bank, Inc., Wealth Management Intern (Long Beach, CA) June 2017 – August 2017.

Responsibilities included performing annual account reviews for Regulation 9 compliance, locating missing beneficiaries using Accurant, completing synoptic forms, analyzing discretionary reports and blankets, paying bills on behalf of 100+ clients, and sending out budget renewal letters. Lead an office wide team building event "Festival of Nations" and

collaborated throughout internship with senior professionals. Became proficient in programs including SEI Wealth Platform, imaging software, Task Management Tool, Trust Money Movement, and Trust Gateway. Analyzed and interpreted governing documents for 200+ accounts, completed a Know Your Client project consisting of 200+ accounts, and worked on an Overdraft project comprised of 600+ accounts.

SunTrust Banks, Inc., Fiduciary Services Intern (Atlanta, Georgia) June 2016 – August 2016.

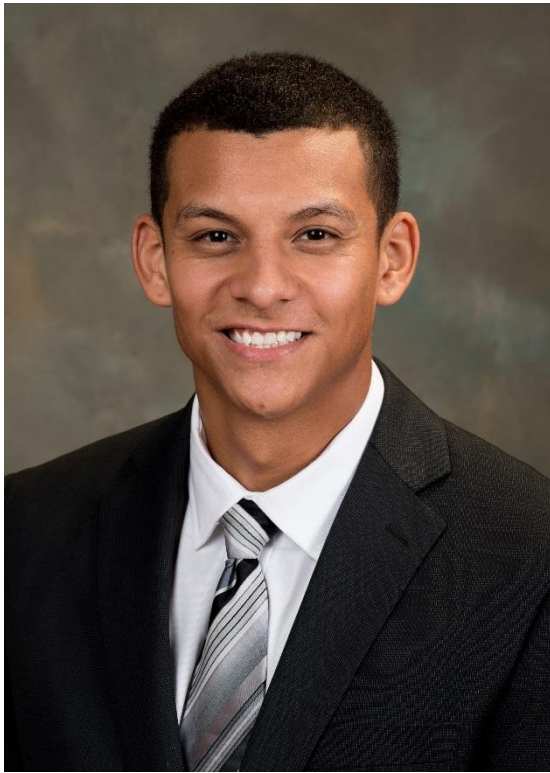
Responsibilities included performing annual account reviews for compliance and sending out continued need letters for clients. Gained experience using Summit View, iWork imaging, Advisor Desktop, SunTrust Portfolio View, Customer StrataStation, Insurance IQ, and LexisNexis. Became proficient in Excel data management. Observed weekly discretionary committee calls. Broadened knowledge by meeting with over 150 SunTrust employees from numerous lines of business. Assisted trust officers in several daily tasks.

Campbell University Residence Life, Residential Advisor (Buies Creek, North Carolina) August 2014 – May 2015. Residential Advisor for an upperclassman dorm. Responsible for the safety and well-being of nearly 120 residents. Enforced university policies. Collaborated with students, parents, teachers, school administrators, and counselors to determine student needs. Mediated interpersonal issues between residents. Communicated with other staff to resolve problems with individual students.

EXTRACURRICULAR ACTIVITIES

Tutor (Dunn/Fuquay-Varina North Carolina) September 2010 – Present. Provided private instruction to individual or small groups of students to improve academic performance. Organized tutoring environments to promote productivity and learning.

Ricardo Hernandez



EDUCATION

Campbell University, BBA in Trust & Wealth Management, Minor in Financial Planning. Expected Date of Graduation: May 2018, Major GPA: 3.500. Fluent in Spanish.

WORK EXPERIENCE

O'reillys Auto Parts, Lillington, North Carolina. May 2016 – current. As sales specialist main duties are tending to both professional and retail customers with their automotive needs. As a bilingual specialist a major duty is to assist customers that are not completely fluent in English. Day to day task can range from simple customer service to maintaining inventory to help minimize losses that may occur. Assisting manager in organizing purchase invoices to help keep records for the possible event of an audit. David Allen Company, Raleigh, North Carolina, Terrazzo Floor Installer, May 2016 – August 2016. Pour and grind terrazzo floors for

many different types of businesses and institutions around the eastern United states. Pouring involved making mixes and measurements that require an attention to detail too little or too much, and the entire process could be ruined. In charge of running numerous machines during the grinding process to reveal the aggregate within the mix. The final product is nothing short of a masterpiece.

Jennafer Hinman



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: December 2017. Scott Ellis Scholarship.

WORK EXPERIENCE

Transition Realty Group, LLC, Real Estate Broker (Raleigh, NC), August 2015-December 2016. Responsible for maintaining client relations. Locate and appraise undeveloped areas for building sites based on evaluations of area market conditions. Compare property with similar properties that have recently sold to determine its competitive market price. Advise clients on market conditions, prices, mortgages and related matters. Promote sales of properties through advertisements, open houses, and participation in multiple listing services. Act as an intermediary in negotiations between buyers and sellers, generally representing one or the other.

Advise sellers on how to make homes more appealing to potential buyers. Present purchase offers to sellers for consideration. Coordinate property closings with an attorney overseeing signing of documents and disbursement of funds. Attend conventions, seminars, and association meetings to enhance professional skills and learn about new market trends. Neighbors & Associates, Inc, Real Estate Broker (Benson, NC), February 2014-May 2015. Interviewed clients to determine what type of property they were seeking. Accompanied buyers during visits and inspections of property as well as advised them on the suitability and value of the homes they visited. Reviewed plans for new construction with clients, enumerating and recommending available options and features. Answered clients' questions regarding construction work, financing, maintenance, repairs, and appraisals. Prepared documents such as representation contracts, purchase agreements and leases. Conferred with escrow lenders, home inspectors and pest control operators to ensure that terms and conditions of purchase agreements were met before closing dates. Whittco Properties, Real Estate Broker (Benson, NC), December 2012-January 2014. Contacted property owners and advertised services to solicit property sales listings. Generated lists of properties that were compatible with buyers' needs and financial resources. Coordinated appointments to show homes to prospective buyers. Developed a network of attorneys, mortgage lenders, and contractors to whom clients could be referred to. Reviewed property listings, trade journals and relevant literature to remain knowledgeable about real estate markets.

EXTRACURRICULAR ACTIVITIES

Daughters of the American Revolution Smith-Bryan Chapter, Benson Historic Preservation Committee - Vice-Chairman, Benson Area Museum of Local History Board of Directors, Benson Area Chamber of Commerce Ambassador, South Johnston Optimist Club, North Carolina Association of REALTORS Leadership Academy, Johnston County Association of REALTORS Board of Directors, Johnston County Association of REALTORS Governmental Affairs Committee - Chairman, Johnston County Association of REALTORS Young Professionals Network - Vice-Chairman.

Gabe Johnson



EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-law, Minor in Financial Planning: Anticipated graduation date: May 2018; GPA 3.774; President's List, Dean's List, Scott Ellis Academic Scholarship, Dr. Ernest Paskel Sauls Business Scholarship, Mary Paschal Trust Scholarship.

WORK EXPERIENCE

First Citizens Bank, Investor Services Intern (Raleigh, NC), May 2017 - Present. Gained experience with NetEx360, Pershing, COGNOS, and EAI reporting and analysis systems. Pulled reports and compiled analyses of books of business for all financial advisors employed at First Citizens, providing sales managers and advisors with comprehensive strategic analysis material. Updated and revised all policies and procedures for front office sales and account servicing. Analyzed and updated individual securities and insurance licenses registered on EAI systems for all licenses held by

employees at the firm. Gained exposure to various lines of business at the bank including, institutional and personal trust, private banking, capital management, special assets management, and commercial banking. Internship prolonged after summer timeframe until December 2017.

Northwestern Mutual; Condrey Group, Financial Representative (Raleigh, NC) May 2016 - May 2017. Licensed in Life insurance, health insurance and disability, and long term care insurance in the state of North Carolina (National Producer Number 17908811). Built personal book of business through client networking and referrals. Worked alongside financial advisors to provide clients with solutions for their retirement planning, investment, and insurance needs. Trained extensively in product recommendation and financial planning methods using CRM and other planning software.

Campbell University, Information Desk Receptionist, September 2014 - Present. Offered comprehensive and broad information on University events, policies, locations, etc. Cashiered for events and concerts.

The Club at Flowers Plantation, Head Lifeguard, June 2012 - August 2015 (Clayton, NC). Fulfilled duties of a certified lifeguard. Managed, supervised, and trained new hire lifeguards on pool policies, procedures, and operations. Taught swim lessons and organized schedules with patrons and customers. Filed daily reports on the pool and workplace for higher managements.

EXTRACURRICULAR ACTIVITIES

Campbell University Student Government Association, President of Sophomore Class (2015-2016) and Junior Class (2016-2017). Kappa Alpha Order at Campbell University, President (2016). Gilbert T. Stephenson Trust Club, Vice President (2015-2016). Campbell University College Republicans, Chairman (2015-2016). Lundy-Fetterman School of Business Student Success Team (2015-2016). Phi Eta Sigma National Honor Society 2015 - Present.

Timothy Johnson



children.

EDUCATION

Campbell University, Masters of Business Administration Trust and Wealth Management. Minor in Financial Planning. Expected date of graduation: May 2018. GPA: 2.67.

WORK EXPERIENCE

Kohl's, July 2014- Present. Sales Associate for Home, Shoes and Kids Department. Assist training new hires to complete customer transactions and replenish stock items when necessary. Responsible for securing premises at the end of the business day. Sonic Drive-In, November 2013- July 2014, Sales Associate, responsible for multiple areas of the restaurant at one time. Kerr YMCA, October 2011- July 2014, After-School Youth Counselor, responsible for overseeing groups of up to twenty children at a time. Responsible for being in charge of activities for the children to do until their parents arrived and also assisted with checkout of the

EXTRACURRICULAR ACTIVITIES

Founding Father of the Sigma-Phi Chapter of the Kappa Sigma Fraternity, Founding Marketing Chairman of the Sigma-Phi Chapter of the Kappa Sigma Fraternity, Social Chairman of the Sigma-Phi Chapter of the Kappa Sigma Fraternity

Jack Kessel



EDUCATION

Campbell University Bachelor of Business Administration in Trust and Wealth Management (Graduation May 2018). Current GPA: 3.179. Scott Ellis Transfer Scholarship. David D. Butler Trust Education Scholarship.

WORK EXPERIENCE

Commercial Driver 2011 – present. Required to safely handle, transport, and off load hazardous materials. Additional tasks include: planning, maintaining, and adhering to a strict schedule. Required to maintain and inspect equipment that costs up to \$250,000.00 and products up to \$40,000.00 per load. Provided face to face customer service on a daily basis. Additional duties also included training new employees to load, transport, and safely deliver hazardous materials in a timely manner while adhering to strict legal precedents. United States Marine Corps 2005-2009. Infantry. Completed two tours of duty during Operation Iraqi

Freedom. Embedded with Iraqi military, police, and security forces. Entrusted to live with, train, and serve on missions with Iraqi forces in order to build the nation's military and security forces infrastructure. Required to maintain expensive crew served weapons and vehicles. Provided weapons and language training to personnel. Fortified the team's compound to survive mortar, artillery, and improvised explosive devices. Handled sensitive materials and provided intelligence tracking. Also served on the All Marine Greco Roman Wrestling Team for 1 year. Required to train three times a day. Traveled the nation as a representative on behalf of the All Marine Wrestling Team, teaching wrestling clinics to high school athletes while assisting Marine Corps recruiters.

Garrick King



EDUCATION

Campbell University, BBA in Trust & Wealth Management. Expected date of Graduation: May 2018; Cumulative GPA: 3.487. Major GPA: 4.0. Dean's List, Presidential Scholarship, Ned B. Ball Business Scholarship, James L. Faison Memorial Scholarship, Marvin Drake Johnson Trust Scholarship, Harold B. Wells Entrepreneurship Scholarship, W. Carl & Jewell Arnold Coleman Business Scholarship.

WORK EXPERIENCE

First Tennessee Bank/FTB Advisors, Wealth Management Intern (Raleigh, NC), June 2017-August 2017. Worked with a support team that assisted all the financial advisers in the Mid-Atlantic region, attended client meetings and shadowed the advisers, learned how to use multiple software programs (eMoney & WealthScape) to open and transfer client accounts, as well as construct and update financial plan information, call leads about setting appointments with the adviser

team.

Campbell University Athletics, Women's Basketball Team Manager (Buies Creek, NC), September 2014-Present. Assist the coaches in the management of the team with day-to-day functions such as: managing team statistics, promoting team events and games utilizing social media, organizing team inventory, laundering uniforms, travel with the team to away games & tournaments, cooperating with fellow managers, greeting visiting teams and facilitating their needs, and filming team practices.

Global Regulatory Associates, Inc., Regulatory Affairs Intern (Clayton, NC), May 2015-July 2015. Assisted the president in the daily operations of the company, gained knowledge about global health codes, laws, and restrictions relating to cosmetic products in the U.S, European Union, Canada, and China, registered numerous cosmetic products for review by domestic and foreign health agencies, like Health Canada and California Air Resources Board, and reviewed raw materials, formulas, packaging, testing, and prepared spreadsheets using Excel that analyze cosmetic product compositions.

EXTRACURRICULAR ACTIVITIES

Student Government Association (Freshmen Class Representative, Sophomore Class Representative, Junior Class Vice President, Academic Committee Chairman), Phi Delta Theta Fraternity (Founding Father of the North Carolina Zeta Chapter, Awards Chairman), Intramural

Basketball, Golf, Help organize and volunteer at the annual Play 4 Pink Breast Cancer Awareness Golf Tournament at the Neuse Golf Club

Samuel Kowbel



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation May 2018. Major GPA: 3.75. Dr. Ernest Paskel Sauls Endowed Business Scholarship, Thomas Joseph and Anne Bell Keith Business Scholarship.

WORK EXPERIENCE

Campbell University Athletic Department, Ticket Operations Manager for Buies Creek Astros (Buies Creek, NC), April 2017—Present. Supervision of ticket operations, group experiences, and guest services; serve as an intermediary between Campbell Athletics and Houston Astros affiliate; work directly with Minor League Baseball officials and management. Requires keen customer service. Facilitate communication on matters concerning both parties. Execute upper management objectives. Campbell University Athletic Department, Student Worker and Intern (Buies Creek,

NC), August 2015 – Present. In charge of on-boarding new hires and subordinates; assist with coordination of athletic events; collaborate with fellow management to determine ways to attract public to Campbell University. Other responsibilities include working closely with fans and students to obtain ideas and feedback; addressing questions regarding Campbell Athletics; providing support for NCAA Division I Athletics; conducting purchases, exchanges, and returns; use of proprietary software for system analysis'. Requires the ability to provide excellent customer service. Recognize and explore areas for improvement and provide solutions and strategies. Developed experience in managing cash, computing bills and phone skills. Deliver highest level of service possible to fans. Campbell University Athletic Department, Strength and Conditioning Intern (Buies Creek, NC), August 2014 – May 2015. Responsibilities included constructing and implementing targeted workouts; providing instruction for proper technique to clients; setting of goals for personalized training. Gained experience in communicating and working as a team to meet a goal. Required knowledge of the human body, listening, and problem solving.

EXTRACURRICULAR ACTIVITIES

Salvation Army volunteer, Red Cross Donor, NCAA Division I Men's and Women's Big South Basketball Championship volunteer, proctor for Harnett County Schools

Jordynne Kuhns



EDUCATION

Campbell University, Master of Business Administration; BBA in Trust and Wealth Management; Minor in Financial Planning. Expected date of graduation: May, 2018; overall GPA: 3.25, MBA GPA 3.00.

WORK EXPERIENCE

People's United Bank, Wealth Management Intern (Portland, ME) May 2017-August 2017

Expanded my knowledge by rotating weekly in Portfolio Management, Trust Administration, Institutional Trust, Retirement Planning, and Financial Planning. Gained experience using WealthStation, FTI, First Rate, Salesforce, and Trust Desk. Created an At Retirement Plan using experience from WealthStation. Reviewed several Trust documents to fill out Trust Synoptics. Shadowed multiple Real Estate Review and appraisals for properties in Special Needs Trusts.

Attended weekly discretionary calls along with monthly TAC meetings. Recorded notes for a Request For Proposal meeting to be added to Salesforce. Prepared spreadsheets and appropriate documentation for WMO to take to client meetings.

Blue Pack Marketing, Customer Service Associate (Clayton, NC) January 2017-April 2017

Responsibilities included handling customer inquiries, complaints, billing questions and payment extension/service requests. Calm angry callers, repair trust, locate resources for problem resolution and design best-option solutions.

Nanny, The Worthington Household (Fuquay Varina, NC) January 2016- January 2017

Full-time caregiver to two children, starting from age 2. Responsible for care, hygiene, entertaining, transportation, and guiding development. Prepare nutritious meals for toddler through school-age children, paying special consideration to multiple allergens, including tree nuts and dairy. Current in infant and toddler CPR certification, American Red Cross.

EXTRACURRICULAR ACTIVITIES

Adam Smith Club, Gilbert T. Stephenson Trust Club

Joseph Lewis



EDUCATION

Campbell University, BBA in Trust & Wealth Management Pre-law, Minor in Financial Planning. Expected Date of Graduation: May 2018. Campbell University Presidential Scholarship.

WORK EXPERIENCE

Homesly & Wingo Law Group PLLC: Temp. Secretary, June-July 2015. I was able to see the inner workings of a law group. I spoke with clients and took care of paperwork as I operated the computer and answered phones. Iron Grill: Server, June-July 2016. I learned how to deal with customers and serve as well as operate the cash register. Pomodoro's Italian American Cafe: Server May-June 2017. I dealt with customers in a high stress environment, providing exceptional service. I learned the importance of friendly and solid service.

EXTRACURRICULAR ACTIVITIES

Campbell Games Club (2017) Volunteer at Habitat for Humanity Restore (June 2015)

Preston Matthews



EDUCATION

Campbell University, Masters of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2018; GPA: 3.68, Major GPA: 3.83, MBA GPA 3.75. Presidents List, Deans List, Presidential Scholarship, Southeastern Trust School Trust Management Scholarship, Newkirk Family Trust Management Scholarship, Eugene Maloney Trust and Wealth Management Scholarship.

WORK EXPERIENCE

Private Wealth Real Estate Intern with Wells Fargo Bank in Atlanta, GA. Summer 2017. Worked with a team of real estate asset managers on the day-to-day tasks associated with managing different types of assets. Reviewed real estate contracts, easements as well as documentation relating to timber sales and estates settlements. Had many opportunities to meet and spend time with clients during property inspections, touring of farmland and timber assets under management as well as be involved with projects to benefit special needs clients. Participated in many stages of investment asset acquisitions for clients as well as the selling of assets. Trust Advisor Intern with Private Wealth Management of Suntrust Bank in Orlando, Florida. Summer, 2016: Worked alongside a team of Trust Advisors to accomplish the daily needs of trust accounts. Directly learned account compliance systems through account reviews and various tasks specific to each account. Had the opportunity to build discretionary cases and present them to the Trust Committee to be voted for approval. Met with clients with a Trust Administrator for correspondence and legal duties. Participated in the real estate inspection of properties transferring into a trust account. Student Assistant with the Southeastern Trust School at Campbell University, June 2015: Assisted the director with the planning, execution and delivery of the Southeastern Trust School. Attended meetings and assisted the participants with location information, moving and dining needs as well as aided other faculty and staff with the operations of the Trust School. Custom Creations, Stedman, North Carolina, 2014 to Present: Embroidery Technician, Operated skill specific machinery as a team and aided in all aspects of production of custom apparel and signs. Pep's Auto Sales, Autryville, North Carolina, Automotive Buyer and Salesman. 2013 to Present: Attended automobile auctions exclusive to Insurance Auto Auction members and purchased vehicles representing Pep's Auto Sales as a dealer, aided in any repair or needs of the automobile before their re-sale to the public. Summer Camp Counselor, Woodmen of the World Insurance, July 2012: Served as a camp counselor, Lived with and was responsible for group of 20 camp attendants ages eight to eleven for duration of one week. Chaperoned each camp attendant to activities, meals and daily duties while caretaking the cabin and ensuring children's safety.

EXTRACURRICULAR ACTIVITIES

Volunteer Firefighter with Godwin-Falcon Fire Department, Pursuing North Carolina fire-fighter level 1 and 2 certifications at night and on weekends. Serving as Vice President for LFSB Adam Smith Club. Gilbert T. Stephenson Trust Club. College Republicans. South River Community Church choir member. Campbell Intramural Sports. Relay for Life. Operation Christmas Child volunteer. Restore and modify classic vehicles of various models and years. Outdoor enthusiast. Kayaking. Boating.

Jordan McNeill



EDUCATION

Campbell University, Master of Business Administration; BBA in Trust and Wealth Management; Minor in Financial Planning. Expected Date of Graduation: May 2018; GPA: 3.050, Major GPA: 3.417, Presidents List

WORK EXPERIENCE

Intern at National Advisors Trust in Kansas City MO; June 2017-August 2017. Responsibilities included: Reviewing trust documents and preparing annual trust reviews, handling confidential information with care, participating in department meetings, assisting the operations team, and assembling distribution packets. Server at Applebee's in Aberdeen NC; June 2016-August 2016. Responsibilities included: Greeting customers and seating them, taking food and drink orders, helping in preparation of food orders, delivering food to customers in a timely manner, answering

customers questions, acknowledging problems that may arise and finding a solution that will make the customer happy, taking up money and giving back the correct change, complete side work, and check off other servers for their completion of their assigned side work. On-Call Banquet Server at Carolina Hotel at Pinehurst Resort in Pinehurst, NC; May 2014-June 2015. Responsibilities included: Setting tables with silverware and glassware for guests, maintaining a sanitary work area, and tending to guests needs. Also spent time in other departments and locations at Pinehurst such as: Décor, CDR (Carolina Dining Room), Number 9, and at Carolina Hotels pool as a Cabana Server. Crew Member at Dairy Queen in Rockingham, NC. July 2012-July 2013. Responsibilities included: assembling and delivering orders to customers quickly and efficiently, maintaining a sanitary work area, and completing assigned prep work for stocking and set up of work area.

EXTRACURRICULAR ACTIVITIES

Gilbert T. Stephenson Trust Club, Adam Smith club, meals on wheels, and volunteer at Senior Citizens center in Richmond County

Ashlee Miller



EDUCATION

Campbell University, BBA in Trust and Wealth Management. Expected Date of Graduation: May 2018. Dean's List, Presidential Scholarship.

WORK EXPERIENCE

U.S. Trust, GWIM Summer Analyst (Chicago, IL), June-August 2017. Assisted in all aspects of trust administration by converting data to new bank systems, processing discretionary distribution requests and recommending actions for daily money movement. Studied U.S. Trust specific financial planning tools. Northwestern Mutual, Financial Services Representative Intern (Raleigh, NC), May-August 2016. Provided financial security to clients by evaluating current situations and recommending products to assist in all aspects of the financial planning process. Learned how to create an insurance illustration presented to clients in closing meetings. Campbell University, Academic Tutor,

January 2015-May 2016. Provided assistance to students needing guidance in statistics. Evaluated exercises and curriculum to target trouble areas for students. McDonald's Corporation, Associate (Charlotte, NC), June-December 2015. Assisted customers with their orders. Trained new hires in procedures and customer service. Provided a positive customer experience for patrons. Carowinds Amusement Park, Food and Beverage Supervisor (Charlotte, NC), Summers 2013-2014. Managed and trained eight associates. Reviewed and replenished inventory. Assigned daily tasks to staff. Provided shift managing for efficient use of manpower. Resolved customer conflicts using excellent customer service skills.

EXTRACURRICULAR ACTIVITIES

Iota Beta Chapter of Alpha Delta Pi, Finance Vice President. Gilbert T. Stephenson Trust Club Treasurer. Campbell University Marching Band, Color Guard. Volunteer for Operation Christmas Child.

Erin Mills



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Pre-Law; Minor in Financial Planning. Expected Date of Graduation: May 2018. Cumulative GPA: 3.9. President's List, Dean's List, Presidential Scholarship, Administrative Scholarships, and various Endowed Scholarships including the Wells Fargo Trust and Wealth Management Scholarship, the BB&T Scholars Program Scholarship, the Bank of America Trust Scholarship, and the Fetterman Business Scholarship.

WORK EXPERIENCE

Wells Fargo Philanthropic Services Intern, Winston-Salem, NC, June 2017 – August 2017. Assisted the Center Serviced, Center Owned, and Planned Giving teams with the monthly Outstanding Check Report, annual account reviews (AARs), and a variety of projects including RMD spreadsheets, small trust terminations, scholarship letter distributions, CFAR

work requests, fee calculations, account research, and correspondence with outside legal entities. Trained with the Grant and Scholarship Administration team on the CFAR and CTAC process and participated in biweekly CTAC and Discretionary Hot Topics calls; assisted the team by completing scholarship recipient spreadsheets. Utilized advanced Microsoft Excel capabilities and resolved account issues by communicating effectively with team members, managers, and relationship managers. Applied and solidified course knowledge of fiduciary administration, nonprofit organizations, and charitable trusts. Gained proficiency in usage of SEI, Trust Gateway, Guidestar website, and all functions found through IFS Navigator such as ImageView, TMM, and TMT; exposed to PG Calc, Gift Wrap, MicroEdge Gifts, iGAM, Tridion, and LexisNexis Accurint database. Participated in numerous call and meetings with relationship managers, risk managers, and account administrators to gain exposure to complexities and challenges unique to philanthropic trust administration.

First Citizens Bank Float Teller/Sales and Service Representative, Raleigh, NC and Winston Salem, NC, May 2015 – August 2016. Formed meaningful relationships with both coworkers and customers in over 20 locations by exemplifying dedication to service excellence. Efficiently and accurately performed teller transactions, including depositing and withdrawing money, processing payments, verifying and cashing checks, and managing personal and business accounts. Managed an average daily balance of \$20,000, recommended bank products, and assisted in acquiring and retaining customers.

Campbell University Lundy-Fetterman School of Business Career Services Assistant, February 2015 – present. Mentored peers in résumé writing, interview skills, professional dress, and career development. Formed streamlined résumé and biography packets for interview panels. Worked closely with the Director to plan catered lunches and receptions for on-campus recruiters, as well as develop plans for career fairs and professional workshops. Created database of interview questions to be uploaded to Perfect Interview software.

EXTRACURRICULAR ACTIVITIES

Lundy-Fetterman School of Business (LFSB) Freshman Seminar Teaching Assistant (2016-present), Omicron Delta Kappa Circle Treasurer (2017-present), Trust Advisors Forum Student Representative (2017), LFSB Peer Mentor (2015-2016), Campus Activities Board (CAB) Executive Board Treasurer (2016-2017), CAB Off Campus Committee Chairman (2015-2016), CAB Social Events Committee Secretary (2014-2016), and Ladies and Gentlemen in Leadership Club Treasurer (2015-2016).

Jordan Monds



EDUCATION

Campbell University, Master of Business Administration, Expected Completion: May 2018, Overall Graduate GPA: 3.5. BBA in Trust and Wealth Management, Minor in Financial Planning. Expected Date of Graduation: May 2018. Overall Undergraduate GPA: 3.4, Major GPA. President's List, Dean's List. Scott- Ellis Scholarship, Robert McIntyre Scholarship, Southeastern Trust School Scholarship, Jimmy E. Witherspoon Trust Scholarship, Peggy R. Lawrence Scholarship.

WORK EXPERIENCE

North Carolina Department of Revenue, Raleigh, North Carolina, Public Affairs/ Examinations Intern, May-August 2018. Duties included responding to public records requests, as well as publishing articles to the NCDOR website in regards to information that could affect North Carolina taxpayers. Additional duties included attending sessions of the

North Carolina Senate and House of Representatives as an assistant legislative liaison for the agency. Received training in ITAS operating systems, which are used to examine vital taxpayer information in order to determine audit eligibility. Monds Cleaning Service, Erwin, North Carolina, Machine Technician, February 2012- Present. Duties include overseeing transportation services for employees to and from job sites. Other duties include the maintenance and transportation of machinery to and from job sites. Gained proficiency in customer service by dealing with store owners directly and harboring responsibility for employee actions. Carla & Redemption Ministries, Lumberton, North Carolina, Drummer/ Singer/ Social Media Manager, January 2008- Present. Supervises a crew of six in managing the sound and merchandise displays for the ministry. Serves as both band director and vocalist with ministry on over two hundred and fifty dates per year. Other duties include managing the inventory and distribution of ministry merchandise. Gained proficiency in a variety of social media markets by managing the ministry's respective accounts. These duties include the editing and uploading of current photos, posting of tour schedules, and the promotion of ministry merchandise. Campbell University Housing, Buies Creek, North Carolina, Lobby Attendant, January- May 2014. Enforced the Campbell University code of conduct in regards to residence halls, in addition to serving as an assistant to both the RD and RA in regards to functions within the building. Maintained the appearance and order of the first floor lobby.

EXTRACURRICULAR ACTIVITIES

Make-a-Wish volunteer, Relay for Life volunteer, Operation Christmas Child, Founder and overseer of annual Thanksgiving food and hygienic supplies drive, Special needs elementary school tutor- Math and English, Business Leaders of Tomorrow, College Republicans, Campbell University Intramural Sports, Campbell University Women's Club Basketball- Assistant Coach, Mission trips- Apache Indian Reservation, Full time drummer for church outreach group Carla & Redemption Ministries.

Matthew Mozynski



EDUCATION

Campbell University, Masters of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2018; GPA: 3.526. Dean's List, Scott-Ellis Scholarship, Campbell University Athletic Scholarship, Southeastern Trust School Trust Management Scholarship.

WORK EXPERIENCE:

ADESA Auto Auction, Auction Driver, Framingham, MA, May 2015-August 2015. Operate motor vehicles on and off auction premises for transport, pickup and delivery. Safely move, stage, and park vehicles in the designated lot area or auction block. Campbell University Divinity School, Computer Lab Supervisor, Buies Creek, NC, January 2015-May 2015. Observe computer lab activities, upgrade computer software, aid students with printing, signing in/out lab equipment, responsible

for closing and locking the lab. Mid Carolina Soccer Club, U14 Girl's Head Coach, Erwin, NC, January 2014-June 2014. Coach a team of nine Under-14 year old girls the rules of the game, prepare and execute two training sessions weekly, manage to instruct techniques to improve each team member's skills, communicate with parents via email with cancellations or changes of schedule. McDonalds, Crew Member, Franklin, MA, April 2012-August 2014. Greet and communicate with customers, responsible for daily food distribution, ensure that the equipment was properly cleaned and working.

EXTRACURRICULAR ACTIVITIES:

Campbell University Varsity Men's Soccer. New England Revolution Soccer Academy.

Marco Perez



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: December 2018; Major GPA: 3.5, Dean's List, Campbell Athletic Scholarship, Campbell University Grant, Scott-Ellis Scholarship, Hope Scholarship, Lynch, Thomas Jack Scholarship. Fluent in Spanish.

WORK EXPERIENCE

Knights of Columbus Insurance Intern, Raleigh, NC: (2017-current). Duties consist of planning and analyzing client financial needs. Implemented Retirement Planning, Life Insurance Policies, Long Term Care, Individual Retirement Accounts, and Disability Income Planning for clients. Worked closely with Field Agents in order to increase sales. Contacted Grand Knights and Financial Secretaries in order to create round tables for numerous councils. Developed strategies to recruit potential Field Agents. Recruited members into becoming Knights. Helped achieve star council for various open territory councils. Translated numerous documents into Spanish. Expanded business in the Hispanic Market. Increased sales by at least 50 percent for each Field Agent. Gained exposure to tax saving strategies. Served as a translator through agent meetings. Researched and developed PowerPoint presentations on investment strategies. Provided phone service in order to set up meeting with clients. Contributed significantly to selling a total of 41 policies in two months. Aided the Knights of Columbus by building and expanding their marketing through social media. Enhanced current PowerPoint presentations. Assisted with customer service operations of the Agency; including answering the phone and replying to basic email. Agency is currently extending employment and is looking to sponsor licensing.

EXTRACURRICULAR ACTIVITIES

Campbell University Varsity Men's Soccer. Relay for Life. Musician (Guitarist).

Parrish Redding



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2018. GPA: 3.677. President's List, Dean's List, Presidential Scholarship, L. Stuart Surles Business Endowed Scholarship, South Eastern Trust School Trust Management Endowed Scholarship, Dr. Ernest Paskel Sauls Business Endowed Scholarship, Strickland Insurance Group Business Scholarship, Mary Paschal Trust Scholarship

WORK EXPERIENCE

American Red Cross – Triangle Area Chapter Fundraising and Development Intern May 2017 – August 2017. Worked closely with Regional Engagement Officers to research foundations and evaluate their funding areas using GuideStar and 990 information to determine which Red Cross Programs fit their criteria. Researched local foundations, grants, and businesses and compiled all information into databases

for internal use for the Eastern North Carolina Red Cross Region. Assisted in the organization and launch of the Services to the Armed Forces Advisory Board by preparing business letters and drafting Board Member job descriptions. Drafted a grant for \$5,000 to provide funding to the Home Fire Campaign and Sound the Alarm initiative. Campbell University, Wiggins Memorial Library Circulation Assistant June 2015 – Present. Support Circulation Manager with daily tasks including circulation management, media inventory, and library organization. Respond to patron questions regarding the locations of library materials, availability of items, technical issues, and Campbell University information. Maintain an inventory of books and their location using Excel.

EXTRACURRICULAR ACTIVITIES

Phi Eta Sigma Honor Society, Operation Inasmuch, Freshman Move-In Day, Harnett County Schools Volunteer, American Red Cross Blood Ambassador and Blood Drive Coordinator.

Caleb Rogers



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management. Minor in Financial Planning. Expected date of graduation: May of 2018; Overall GPA: 3.02. Major GPA: 3.00. Dean's List. Presidential Scholarship; Duke University Tuition Grant Recipient; James E and Mary Z. Bryan Scholarship; McNeil Chesnut Trust & Wealth Management Scholarship.

WORK EXPERIENCE

John Hiester Chevrolet of Lillington; Product Specialist; Greeted customers and evaluated what each customer wanted or needed; Describes merchandise and explained use, operation and maintenance of vehicles; Maintained knowledge of all vehicles, sales, promotions and policies regarding payment; Demonstrated operation of vehicles; Completed preliminary sales contracts; Prepared

vehicles for purchase.

Stuart Surles Insurance Agency; Administrative Assistant; September 2016 to December 2016; Digitally organized business records that provided easier access for all employees; Uploaded records to an online database.

Comfort Engineers; Team Member, summers of 2014 & 2015; Installed air conditioning ducts; Activated individual air conditioning units per the scope of the client; Provided excellent team support with reliability and dedication; Loaded service vehicles with job coded equipment.

EXTRACURRICULAR ACTIVITIES

Gilbert T. Stephenson Trust Club, Campbell University Intramural Sports

Lesley Rogers



EDUCATION

Campbell University, Masters of Business Administration, BBA Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2018; GPA: 3.4; Presidential Scholarship, NC Baptist Scholarship, Scholarships for Military Children Scholar.

WORK EXPERIENCE

Island House Hotel, Assistant to the General Manager, 1852 Grill Room Hostess and Floor Manager on Duty (Mackinac Island, Michigan), May-August 2015. Promoted to assistant to the General Manager after first month of work. Developed relationships with guests of the hotel and customers of the restaurant. Responsible for talking to customers and resolving any issues they may have had with their meal or their check. Dealt with issues on the Micros system and fixed checks for servers. Delegated opening and closing tasks and managed 4-6 people per shift. Closed out the Micros system at

the end of the night, counted the drawer, and determined tip out money. Worked special events hosted by the hotel, such as: Chicago Yacht Race parties, Wawashkamo Golf Club opening ceremony, Mackinac Island Lilac Festival events, and several weddings. BB&T Wealth Intern, May-August of 2016 and 2017. Tasked with completing account reviews for the IRA and ILIT teams. Organized merging accounts. Managed up to date retention letters and correspondence with clients. Traveled to Richmond, Virginia, Washington D.C., Florida, and South Carolina to see the different markets and shadow private financial advisors. Tasked with women and wealth project in order to appeal to a bigger market for women. Organized information for updating the Private Advisor role based site.

EXTRACURRICULAR ACTIVITIES

Lundy Fetterman School of Business Admissions Team, Finance Club, Club basketball, Intramural sports. Attended Missions Trip to Washington D.C., Business and Culture in Portugal and Spain study abroad trip, Marketing student worker with Campbell Athletics.

Trevor Sheets



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning, Expected Date of Graduation: May 2018. Overall GPA: 3.13
Presidential Scholarship, Leadership Scholarship.

WORK EXPERIENCE

Consumer Banking Summer Analyst- Client Experience Team at Bank of America. June 2017-July 2017. Assisted with the implementation and pilot of a new survey system that streamlined the customer feedback process for the bank. Created a system to keep executives updated on new initiatives throughout the Bank that would impact Client Experience. Created a document that outlined all aspects of the Client Services line of business for the use of members of the Client Experience team. Taproom Attendant at White Rabbit Brewing Company. May 2016-June 2017. Helped with the

serving of customers, as well as the upkeep of the taproom. Assisted with organizing and setting up for any events at the brewery including but not limited to live bands, cookouts/barbecues, tours, and other special events. Instructor at Campbell University Swim School. June 2015-July 2015, June 2016-July 2016. Assisted with the teaching of over 500 children at the school. Organized parental drop off and pick up in order to improve the efficiency of the transition between swim classes. Outside Services at Dana Rader Golf School May 2014-July 2014. Set up the practice greens and driving range. Also prepared the school for children's and adult's camps, transported guests around the facilities, and cleaned the inside of the building.

EXTRACURRICULAR ACTIVITIES

Member of the Campbell University Football Team. Member of Phi Eta Sigma National Honor Society. Fellowship of Christian Athletes. Campbell University Ransom. Volunteered in Operation Inasmuch. Volunteered for Habitat for Humanity.

Will Spainhour



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust & Wealth Management, Minor in Financial Planning. Expected Date of Graduation: May 2018. Overall GPA: 3.93. President's List, Presidential Scholarship, Southeastern Trust School Scholarship, BB&T Scholar, Mary Paschal Scholarship, Edith and Raymond Mulkey Business Scholarship, Dr. Ernest Paskel Sauls Business Scholarship, Chick-Fil-A Scholarship.

WORK EXPERIENCE

First Citizens Bank, Wealth Management Intern (Raleigh, NC), May 2017-August 2017. Completed initiatives within Institutional and Personal Trust focused on refining processes to optimize efficiency through various contributions. Beta tested new software for Institutional Trust to evaluate effectiveness of the product. Conducted research and

assisted in creation of presentation presented before the Trust Committee and Board of Directors. Assisted the estate settlement team with collection and valuation of probate and non-probate assets. Wells Fargo, Project Analyst (Wilmington, NC), June 2016-December 2016. Reviewed trust, IRA, and agency accounts for multiple markets in the Mid-Atlantic Region to ensure all necessary information has been gathered to comply with federal regulations. Actively communicated with relationship managers to acquire all necessary information for accounts. Became proficient with financial systems such as Trust Gateway, Navigator, SEI, and ClientLink. Shadowed relationship managers and observed successful sales techniques for the trust and wealth management industry. Bank of North Carolina, Roving Teller (High Point, NC), May 2014-May 2016. Determined customer needs and referred customers to platform associates. Dealt with federal regulations, including Reg. CC. Received experience with various types of bank accounts. Proven record of verifying, maintaining, and balancing allocated cash drawer. Participated in dual control functions to comply with bank security procedures. Southeastern Trust School, Student Assistant (Buies Creek, NC), June 2015. Assisted the director with the planning, execution, and delivery of the Southeastern Trust School. Attended meetings and assisted other faculty and staff with the operations of Trust School. Campbell University, Accounting/Economics Tutor (Buies Creek, NC), January 2015-May 2015. Helped students understand complex concepts. Observed students problem-solving and suggest study tips. Assisted with application of challenging concepts. Chick-Fil-A, Team Member (Asheboro, NC), June 2011-March 2014. Trained several co-workers. Determined how much food to prepare near closing to minimize wasted food. Managed sanitation, health and safety standards in work areas.

EXTRACURRICULAR ACTIVITIES

Finance & Investing Club-President, School of Business Admissions Team, Lundy-Fetterman School of Business Student Mentor, Phi Eta Sigma Honor Society, North Carolina Student Legislature-Served on Resolutions Committee, Gilbert T. Stephenson Trust Club, Campbell University Relay for Life-Volunteer.

Scott Ethan Stewart



EDUCATION

Campbell University: Master of Business Administration, BBA in Trust & Wealth Management, Minor in Financial Planning and Spanish. Expected Date of Graduation: May 2018. Overall GPA: 3.58. President's List, Dean's List, Presidential Scholarship, BB&T Scholars Program, Jimmy E. Witherspoon Scholarship, John Hill Trust and Wealth Management Scholarship, Mary Paschal Trust Scholarship, Janice Daniels & Clifford Russell Scholarship.

WORK EXPERIENCE

Wells Fargo: Wealth and Investment Management Intern (Philadelphia, PA), June 2017-August 2017. Assisted in the administration, termination, and distribution of moderately complex accounts of all types, such as Irrevocable Trusts, IRAs and Revocable Trusts with some in excess of \$5 million. Analyzed accounts to ensure that the client's investment objectives followed stipulations in the governing document and that the accounts were compliant. Scheduled and assisted in the distribution of trust funds to clients and beneficiaries. Wells Fargo: Trust Asset Management Intern (Winston-Salem, NC), June 2016-August 2016. Oversaw a \$50 million+ portfolio of closely held businesses, partnerships, real estate and alternative assets. Conducted annual analysis of 50+ companies by applying standard business valuation and financial analysis techniques. Represented client assets in a transactional setting. Identified risk within assets and suggested different concentration mixes. Southeastern Trust School: Student Assistant (Buies Creek, NC), June 2015. Assisted the director with the planning, execution, and delivery of the Southeastern Trust School. Coordinated with the director of the Trust program in setting up and organizing materials for the Southeastern Trust School. Attended meetings and assisted other faculty and staff with the operations of the Trust School. Trust Advisors Forum: Student Assistant (Pinehurst, NC), February 2015. Assisted the director of the Trust Program and the executive director of the Trust Education Foundation in the planning, setup, execution and follow-up of the 2015 Trust Advisors Forum. Attended classes and workshops that were designed to educate Trust professionals in new methods and techniques in order to perform their jobs more proficiently. Agape Church: Assistant Website Designer (Little Rock, AR), May 2014-August 2015. Planned site design by clarifying goals and designing for functionality. Prepared site by installing programming language and formatting tools. Edited and filmed a commercial for VTN (Victory Television Network). Ensured cross-platform compatibility. Upgraded site by updating content and graphics, monitored performance and results by identifying and evaluating improvement options. Introduced new technology and maintained links.

EXTRACURRICULAR ACTIVITIES

Lundy-Fetterman School of Business Student Mentor Phi Eta Sigma Honor Society, Finance and Investing Club – Senior Analyst, North Carolina Student Legislature – Head Chair of Awards, Student Government Association – Vice Chair of Elections, Gilbert T. Stephenson Trust Club.

Brianne Van Apeldoorn



EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning: Expected date of graduation: May 2018; GPA: 3.089. Scott Ellis Scholarship, Southeastern Trust School Trust Management Scholarship, Administrative on Campus Housing Scholarship.

WORK EXPERIENCE

Texas Steakhouse Restaurant, New Bern, North Carolina, Server, June 2015-Present. Responsibilities include maintaining a clean workplace. Greeting guests at tables with information regarding restaurant offers. Memorization of restaurant menu and daily specials. Meeting the needs of guests to ensure overall guest satisfaction. Accurately processing credit card and cash payments. Valentine & Mcfadyen Law Firm, New Bern, North Carolina, Mentee, March 2015. Responsibilities included working with and learning from the previous District Attorney of New Bern,

David Mcfadyen. Conducting observations at the Craven County Courthouse. Gaining experience with and knowledge of Personal Injury, Criminal Defense, and Family Law Cases. Van Apeldoorn Tax Accounting Services, New Bern, North Carolina, Assistant, 2011-2014. Responsibilities included assisting business administrator with daily transactions and scheduling process. Pickup and delivery of paperwork such as tax returns and payroll. Maintain record keeping and filing up-to-date. Performed minor calculations regarding balance sheets. Organized client information and paperwork. Observed payroll processes for large companies. Set and confirmed client appointments. Dance Theatre, New Bern, North Carolina, Dance Instructor Assistant, 2010-2011. Responsibilities included working with fifteen or more students per class. Teaching different styles of dance such as tap, ballet, jazz, etc. Learned and executed classroom management skills while observing student performance and progress. Inform and prepare students for competitions and recitals.

EXTRACURRICULAR ACTIVITIES:

Delta Phi Epsilon Sorority, Gamma Upsilon Chapter, Public Relations Coordinator and Minna Chair, May 2016-Present. Responsibilities include holding two coordinator positions within the chapter. Maintaining all chapter social media accounts including Instagram, Twitter, Snapchat, and Facebook. Designing, editing, and publishing illustrations, pictures and informational flyers. Marketing upcoming Philanthropy events such as fundraisers for Cystic Fibroses, Educational Foundation, and Anorexia Nervosa and Associated Disorders (ANAD). Monitor all members' personal social media accounts to ensure each member is held to chapter standards of excellence.

Buies Creek Elementary School, Volunteer, 2015-Present. Responsibilities included helping students excel in learning. Reading to children. Campbell University Trust Club, Communications Coordinator, January 2016-May 2016. Responsibilities included the upkeep of social media. Campbell University Campus Activities Board, 2014-2015. Responsibilities included attending and contributing to weekly meetings. Participated on the Homecoming committee. Prepared and executed various on-campus events.

Eric Westbrook



EDUCATION

Campbell University, Master of Business Administration; BBA in Trust and Wealth Management; Minor in Financial Planning; Expected date of graduation: December 2018; Scott Ellis Scholarship, Leadership Scholarship.

WORK EXPERIENCE

Walmart Supercenter (Rock Hill, SC) Member of Cap Team from May 2016 – August 2016. Worked in a team of 8-12 responsible for processing deliveries from the trucks daily operations. Performed inventory for the store daily. Interacted and assisted customers every day. Established customer relationships that resulted in sales.

Ross distribution center (Rock Hill, SC) Worked in PTL from May 2017-August 2017. Worked in a production based system. Scanned, labeled, and stocked merchandise.

EXTRACURRICULAR ACTIVITIES

Three-year Letter with the Campbell University Fighting Camels Football team; (2014-Current). Volunteer with Operation INASMUCH. 20 hours of community service (2014-current) Campbell University Ransom.