



CAMPBELL
UNIVERSITY

Lundy-Fetterman
School of Business

Trust & Wealth Management

2020 - 2021
Intern Placement Bulletin

Candidate List

Below is an alphabetical listing of the talented students included within this bulletin. Please browse this document to learn more about each of them, including education, work experience, and involvement in extracurricular activities.

Adam Ardis
Zach Barnes
Robert B. Bass III
Seth W. Berger
Brianna Bryant
Melea Butler
Laura Care
Micaela Casapulla
Hayes Chamblee
Nickolas Childs
Jacob Clarke
Tymeek Cobb
Cameron Colella
Evan Cornelius
Tyler Dail
W. Camden Dascombe
Angel Evans
Joseph Faucette
Brady Frampton
David Gaster
Joseph Giarmono
Peter Gilder
Taylor Gunter
Tyrek Haywood
Dwight Hendricks
Hannon Herring
Rachel Jones
Austin Knapp
Dakota Leonard
Alexa Mangum

Steven Mangus
William Mann
Patience Marshall
Christopher Matthews
Kylie McDonald
Philip Merritt
Kevin Mills
Jefferey P. Moore
Prince Ngwenah
Kasey Norris
Christin Oliver
Walton O'Neal
Travis Peacock
William Phenicie
Gerald H. Quinn III
Savanna Rocco
Aaron Schnoor
David Aaron Smith
Frank Sydnor
Landon Tate
Lowell Taylor
Keshawn Thompson
Thomas Webster
William Wells
Levi Wiggins
Nolan Wiggs
Austin Williams
Garret Wilson
Christopher Yoder
Sedeq Younger

Adam Ardis



EDUCATION

Campbell University, Master of Business Administration (Proposed Applicant) with BBA in Trust and Wealth Management, Minor in Financial Planning. Expected graduation: May 2022. Overall GPA: 3.188. Received multiple scholarships including: Presidential Scholarship (\$17,000); North Carolina Need Based Scholarship (\$7,300); Southeastern Trust School Trust Management Scholarship (\$500); DNU-Administrative On-Campus Housing Scholarship (\$1,000); Alumni Referral Scholarship (\$500); Thomas Jack Lynch Scholarship (\$1,000). Received Dean's List. Acquired NC Real Estate License.

WORK EXPERIENCE

HomeTowne Realty (Clayton, NC), Broker, July 2020-Present. Show properties of interest to potential and current buyer clients. Assist with showings of our current listings to potential buyers. Send properties of interest to buyer clients. Diligently work with other agents to ensure a smooth closing for both sides. Ensure that my client's best interest is being performed. Cases-Up (Wilmington, NC), Weekend Merchandiser, January 2019-Present. Stock merchandise at different convenient and grocery stores. Coordinate route for specific locations. Train new employees. Mims Distributing Company (Raleigh, NC), Weekend Merchandiser, Stand-by Week Merchandiser, January 2017-2019. Stocked merchandise at different convenient and grocery stores. Stacked bulks off delivery trucks. Trained new employees and assisted employees during high volume weeks. McDonalds Corp. (Clayton, NC), Crew Trainer, April 2015-November 2017. On-boarded new hires thoroughly adhering to strict company guidelines. Administered monthly test to current employees. Ensured new employees are up to speed on the working process. Often worked as a cashier at the drive thru where I was responsible for transactions and keeping drawer balanced.

EXTRACURRICULAR ACTIVITIES

Kappa Sigma Fraternity; Treasurer, Campbell University Honors Program; Student, Ducks Unlimited Campbell Chapter; Member, Campbell University; Intramural participant, Boy Scouts of America; district board of review (Eagle Scout), North Carolina Governor's Paige (Spring of 2015); Volunteer. IRS Volunteer Tax Return (2020), VITA Certified.

Zach Barnes



EDUCATION

Campbell University, BBA in Trust and Wealth Management, 4+1 MBA, BB&T Leadership Certification, 3.308 Cumulative GPA, Received Scott Ellis Scholarship, Out of State Resident Scholarship, Men's Wrestling Athletic Scholarship, Expected Date of Graduation: May 2022.

WORK EXPERIENCE

Des Moines, IA, Terry's Quality Concrete, Construction Laborer, May 2016-August 2019 (Summers), Assisted in Calculating Total Volume of Concrete needed for Sidewalks, Patios, and Driveways, Responsible for Setting Concrete Forms Accurate to Job Sketch Measurements, Collected Payment Check upon Job Completion, Assisted in all Manual Labor, Buies Creek, NC, Kolat Wrestling Camps, Camp Counselor, June 2017-September 2019, Chosen

to be Responsible for Monitoring Camp Dorms and Solving Camper Conflicts, Responsible for Teaching Specific Wrestling Techniques Until Campers Were Proficient in Each, Gained Valuable Leadership and Teamwork Skills.

EXTRACURRICULAR ACTIVITIES

Campbell University Varsity Wrestling Team, 149lbs Wrestler, August 2017-Present.

Robert B. Bass III



EDUCATION

Campbell University, Master of Business Administration (intended applicant), BBA in Trust & Wealth Management, Minor in Financial Planning, Expected date of graduation: 2023(MBA); GPA 3.446, Scott-Ellis Scholarship, Dean's List.

WORK EXPERIENCE

Bass Crane Service LLC, -Richmond, Virginia; Driver/Laborer; June 2017-Present 2020 (Summers) Completed Delivers to and from Job sites of small equipment and tools. Worked on the salvage, transportation, and sale of valuable raw materials. Responsible for the collection and transportation of large amounts of cash. Lexus of Richmond Inc, -Richmond, Virginia; New Car Sales Valet; January 2016-November 2016. Managed and responsible for the arrival and categorization

of new vehicle shipments daily. Responsible for driving customers and vehicles to and from required locations. Managed restocking and maintenance of all provisions for the dealership. Responsible for vehicle and key locations.

EXTRACURRICULAR ACTIVITIES

Buies Creek Fire Department Volunteer Fire Fighter, Member and Number 5 Officer (Historian) of Kappa Alpha Order, Personal Investment Portfolio Management and Advisement, Intramural Sports

Seth W. Berger



EDUCATION

Campbell University, BBA in Trust & Wealth Management, Minor in Financial Planning, Minor in Music. Expected Date of Graduation: May 2022. GPA: 4.0. President's List Presidential Scholarship, Top 10 Percent Award, The Eugene Maloney Trust and Wealth Management Scholarship.

WORK EXPERIENCE

Comerica Bank Internship July - August 2020. Cycled through different departments of the bank including the Advisory Board, Investments, Charitable, Special Needs, and other units. Engaged in meetings involving topics ranging from auditing, quarter performance, legal, institutional trust, and discretionary requests. Handled any tasks assigned, such as interpreting trust documents, completing forms, and

creating a list of qualified charities. Completed an end-of-internship project consisting of a basic estate plan for a given family, tying together different aspects of the banking industry, financial planning, and trust administration. Bookkeeper Assistant August 2020 - present. Assist a local businessman with basic bookkeeping tasks such as receipts, bank deposits, and checks. Utilize tools such as MinistryLinq, Quick Books, and various banking websites. Wiggins Memorial Library/Circulation Student Worker (Campbell University) September 2018 - present. Respond to the needs of library patrons. Apply customer service skills by interacting with a variety of patrons. Transcribe multimedia resources for accessibility. Research answers to patrons' questions regarding information. Duties include interacting politely and efficiently with patrons, taking inventory, and assisting patrons locate and use library materials. Foreign Language Lab Student Worker (Campbell University) September 2017 - April 2018. Supervised the foreign language lab space, making sure that it was tidy and a good environment for learning.

EXTRACURRICULAR ACTIVITIES

Musical volunteer at local Alzheimer Ward at Harnett Woods (three years). Intramural rec teams.

Brianna Bryant



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management, Minor in Financial Planning, Expected date of graduation: May 2022; GPA: 3.024; Scott-Ellis Scholarship, Hope Scholarship, Women's Softball Scholarship, Women's Softball Room and Board Scholarship, Athletic Book Scholarship.

WORK EXPERIENCE

Multiple Listing Service Coordinator, Townsend Real Estate, May-August 2019. Reviewed contracts and listings for compliance and accuracy, entered new listings into MLS (Multiple Listing Service), coordinated with inter-office personnel, ensured the efficient operations of daily office workflow, created and retained business relationships with customers, edited and published marketing advertisements, and

answered phones and performed office transactions.

EXTRACURRICULAR ACTIVITIES

Division 1 Student Athlete, Softball, Campbell University. Iron Camel recipient, Freshman of the Week, Player of the Week, and First Team All-Conference Honors, North Carolina RBI State Record Holder, Veterans Administration Volunteer, Miracle League Volunteer, Member of Campbell University Christian Athletes.

Melea Butler



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust & Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2022. GPA: 3.910. President's List, Dean's List, Presidential Scholarship, Administrative On Campus Housing Scholarship.

WORK EXPERIENCE

Campbell University Residence Life, Community Assistant 2019-Present. Duties consisted of building community, creating a safe environment for residents, and nurturing a welcoming atmosphere within the residence hall. Coordinated monthly programs to promote engagement and interaction among other residents. Communicated with different levels of authority and work with other staff

members within the Residence Life Department. Attended monthly all staff meetings to receive updates from Residence Life. Assisted and supported residents with any concerns they might have had, as well as referred them to other Campbell University resources when needed. Campbell University First Year Experience, Peer Mentor 2019-Present. Duties consisted of co-teaching a CUFS seminar class for incoming students once a week. Met with a paired faculty member once a week to plan the class based on assigned topics and prepared corresponding activities. Shared skills and tips about what it means to be in college and how to be a successful student. Scheduled an individual meeting with each mentee to ensure they were experiencing a smooth transition into college and helped them learn to adjust.

EXTRACURRICULAR ACTIVITIES

Campbell University Student Government Association (CUSGA), Sophomore Secretary and Treasurer (CUSGA), Student Affairs Committee (CUSGA), Junior Secretary (CUSGA), Public Relations Committee (CUSGA). Phi Eta Sigma National Honor Society, member; The Honor Society of Phi Kappa Phi, member. Campbell University Residence Hall Association (CURHA), Chair of Programming and Outreach.

Laura Care



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2023; GPA: 3.806. President's List, Dean's List, BB&T Business Fellow, Presidential Scholarship, Lewis M. & Annabelle L. Fetterman Business #2 Scholarship, Thomas Joseph and Anne Bell Keith Business Scholarship, RA Housing Scholarship, Administrative on Campus Housing Scholarship, CU Legacy Scholarship, First Presbyterian of Henderson Scholarship, DAVA Scholarship, and Optimist Club of Henderson Scholarship.

WORK EXPERIENCE

North Carolina General Assembly, Office of Senator Carl Ford, Raleigh, NC, Legislative Intern; January-August 2020. Duties consisted of resolving constituency issues and concerns independently and collaboratively with Senator Ford, wrote congratulatory and new voter letters to constituents within the district, drafted press releases and newsletters, assisted with special projects, and handled various office responsibilities. Jonathan S. Care Attorney at Law, Henderson, NC, Summer Employee; May 2015-Present. Duties consist of filing documents at the Vance County Register of Deeds, Tax Administration Office, and Clerk of Court; attending trials and hearings; conducting title searches on properties; ensuring all legal documents are scanned into the system and sorted appropriately; and screening phone calls and emails. Campbell University Residence Life and Housing, Buies Creek, NC, Community Mentor; August 2020-Present. Duties consist of overseeing 16 residents in Hedgpeth Hall; mentoring residents to develop their full potential as a person, student, and a member of the Early College Credit Offers Opportunity (ECCOO) community; maintaining the confidentiality of information pertaining to Residence Life and Housing, as well as resident's personal information; building community by interacting with the ECCOO residents; communicating to residents, fellow staff members, and Residence Life and Housing Staff about anything going on within the community; planning and executing programming within the residence hall to develop community and connections between the residents.

EXTRACURRICULAR ACTIVITIES

Vice President, Campbell University Residence Hall Association (RHA); Lieutenant Governor, North Carolina Student Legislature (NCSL); Peer Fellow, Freshmen BB&T Business Fellows Program; Peer Mentor, Campbell University First Year Experience CUFS-100 class; Orientation Leader, Campbell University First Year Experience; Children's Leader, First Presbyterian of Dunn Children's Fellowship; Small Group; Lundy Fetterman School of Business Admissions Team.

Micaela Casapulla



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2022; GPA: 3.462. Campbell University Presidential Scholarship.

WORK EXPERIENCE

Restaurant Server and Cashier at Dogleg Pizza Company in Buies Creek, NC (August 2019-September 2020). Greeted customers in a friendly, welcoming manner. Managed the cash or credit card payments for all orders, including dine in and take out. Assisted customers with their needs or questions. Maintained a clean and neat dining room for customers during shift and at closing. Accurately served food from the kitchen to the customers, as well preparing any to go orders. Trust and Wealth Management Intern at Comerica Bank in a remote environment (July 2020-August 2020). Attended meetings with various departments, including individuals in senior upper management. Completed a project for the duration of the internship to create a mock estate plan based on the needs of a family. Created a proposal for a charitable account's donations. Participated in a virtual volunteering opportunity. Created an investment strategy using company software. Learned how to process beneficiary requests and other bill payments. Nanny for multiple families in Orange and Woodbridge, CT (2012-2019). Ensured the safety and well-being of children of various ages at all times. Assisted with daily routines of the family home such as cleaning, cooking, escorting children to and from activities and appointments. Provided care and structured play for all children, while also providing an educational environment. Store Clerk and Cashier at Jesse's Toy Shoppe in Orange, CT (November 2016- July 2019). Provided a friendly, welcoming greeting to customers as they walk into the store. Managed all transactions accurately including cash and credit. Balanced cash drawer at the end of shifts. Listened to customers' requests and assisted them in selecting items that would adhere to their requirements. Reviewed inventory in the store as well as in the backroom. Replenish front items as needed. Accurately unpacked shipments and reorganized shelves to place new items received. Assisted customers with gift cards, exchanges, store credit, and returns. Specialized in wrapping customers' purchases with care and panache. Managed closing duties, including reconciliation of cash drawers. Carhop and Front of House at Sonic Restaurant in Milford, CT (May 2018-August 2018). Accurately take customers' orders through headset and record them for

cooks. Assisted team members with tasks when shifts were exceptionally busy. Answered questions about menu and food selections as well as provided recommendations for guests. Efficiently prepare ice cream, milkshake, slushy, and drink orders for guests. Present orders to guests in a timely manner with necessary utensils and condiments. Utilized the cash register correctly for guest's credit cards or cash bills. Updated receipts in order to keep track of charged bills and tips.

EXTRACURRICULAR ACTIVITIES

Member of Campbell University Delta Phi Epsilon Sorority

Hayes Chamblee



EDUCATION

Campbell University, BBA in Trust & Wealth Management, Minor in Financial Planning. Expected date of graduation: December 2021.

WORK EXPERIENCE

Manage and grow a personal stock portfolio, August 2016 - Current. Actively choose stocks and complete due diligence on company history to decide what investment is the best fit. and manage risk by spreading capital over eight companies and knowing when to let your winners run and cut losses early.

EXTRACURRICULAR ACTIVITIES

Campbell University Finance & Investing Club, September 2017 - May 2018, Campbell Trust Club August 2019 -Current.

Nickolas Childs



EDUCATION

Campbell University, Master of Business Administration (Proposed Applicant), BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: November 2023. Overall GPA 3.063; Campbell University Scott-Ellis Scholarship; Federal Pell Grant; Out of State Resident Scholarship

WORK EXPERIENCE

Assistant Museum Educator 2016-2018; Ran camps ranging from 4-13 years old; Managed money coming in and leaving the establishment; Operated Nasa equipment Educate the public on new scientific discoveries; Supervise other workers/volunteers when completing difficult tasks; Provided a positive work environment to

ensure high moral and good work ethic Photographer/Videographer 2018-Present; Receive assignments to complete by a deadline; Train new employees on specific programs and how they work ; Report to my supervisor on certain assignments; Assist other workers in group assignments; Take photos and collect footage at sporting events; Edit photos and videos to create content for the department to use

EXTRACURRICULAR ACTIVITIES

Pine Burr Yearbook Club; Intramural Volleyball; Volunteer for Girl Scout Troop 4020

Jacob Clarke



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected date of graduation: May 2023; Overall GPA: 3.508; Dean's List; Presidential Scholarship, Top 10 Percent Award, Lewis M & Annabelle L Fetterman Business Scholarship, Robert Allen Jr McIntyre Endowed Scholarship, Chick-Fil-A Leadership Scholarship, St. Pauls Folk Arts Festival Scholarship, Chick-Fil-A Zachery Murdock Memorial Scholarship

WORK EXPERIENCE

All American Alarms, Parkton, North Carolina, Data Manager; 2019-Present. Organize and reconcile banking statements for several accounts. Create and prepare invoices for clients with new and current alarm systems using the Admin QuickBooks platform. Make payments on accounts payable via online banking. Campbell University Office of Admissions, Buies Creek, NC, Admissions Ambassador; August 2020-Present. Assisting Senior Counselors and Admissions Staff in answering phones, filing applications, and facilitating tours for prospective students in person and virtually. Campbell University Lundy Fetterman School of Business (LFSB), Buies Creek, NC, Student Mentor, August 2020-Present. Work in conjunction with the Dean and Director of Student Success in order to assist first year business students in the transition to college, provide academic support with other courses and provide feedback through assignment grading for all submitted assignments. Chick-Fil-A, Lumberton, NC, Team Member, September 2017-Present. Assisted customers by providing information within the restaurant and resolving any complaints. Received payment by cash, credit cards, or automatic debits. Established customer orders and conveyed them to other team members for preparation.

EXTRACURRICULAR ACTIVITIES

Student Government Association (SGA) Executive Board Member serving as the Executive Chief of Staff, SGA Judicial Committee, Pine Burr Yearbook Assistant Editor in Chief, Campbell University Orientation/Transition Leader, Campus Activities Board (CAB) Spring Fling Committee, BPHC Director of Digital Media, SGA Freshman Class Representative, SGA Advancement Committee, Campbell University North Carolina Student Legislature (NCSL) Treasurer, Pine Burr Yearbook Organizational Editor.

Tymeek Cobb



Cameron Colella



EDUCATION

Campbell University; Master of Business Administration Candidate, BBA Trust and Wealth Management, Minor in Financial Planning; Expected graduation: May 2022; GPA: 3.851; Major GPA: 4.0; Presidential Scholarship, Out of State Resident Scholarship, Major Sam Byrd Trust Education Scholarship, First Citizens Bank Scholarship.

WORK EXPERIENCE

Trust Administration Intern at RBC Trust Company (Delaware) Limited in Wilmington, Delaware, Summer 2020: Drafted discretionary distribution requests for clients and ensured they were processed efficiently. Assisted Trust Officers in day to day administration and maintenance of accounts and supported team members and colleagues to complete team-based projects. Reviewed

asset allocations to ensure portfolio investment accuracy, analyzed Trust agreements to assure clarification of dispositive provisions. Oversaw weekly account acceptance and various trust committee meetings. Created and updated spreadsheets to properly track categorized disbursements and income. Developed a proficiency in programs including SEI Trust 3,000, CSS, IBS, and Document Imaging. Camp Counselor at Mount Laurel School District, Camp Laurel, in Mount Laurel, NJ, June 2013 - August 2019: Managed classroom sizes from 15-25 kids, ages 6-10, organized games, crafts, activities and trips for kids. Oversaw the safety and security of camp participants to reduce risk of bodily harm or incidents in a variety of situations and provided first aid care, CPR certified. Student Peer Review Tutor at Campbell University Academic Services, Buies Creek, NC, January 2018 - May 2019: Organized weekly review sessions, took role, submitted paperwork and session reports, managed lecture sized student groups and additionally provided private tutoring for two Military Veterans. Provided students with a student-based, peer review style understanding of their class material. Student Ambassador and Fundraising Leader for the Movember Foundation, Campbell University, September - November 2019: Coordinated and met with campus sponsors, demonstrated and taught fundraising techniques, developed campus relationships in order to raise funds. Organized and orchestrated fundraising for Campbell University's IFC Board, Greek Life organizations, collaborated with Campbell Counseling Services and Campbell Athletics. Collectively raised over \$3,000 in the month of November to support men's health.

EXTRACURRICULAR ACTIVITIES

Member of the Phi Eta Sigma National Honor Society, Assistant Grand Procurator, Assistant Grand Scribe, Scholarship, Fundraising, Risk Management, T-Shirt, and Brotherhood/Fellowship Chair of the Sigma Phi Chapter of the Kappa Sigma Fraternity, President of Scholarship on the IFC (Inter-Fraternal Council) Board, Member of the Trust Club, Annual volunteer for the Nicky Green Memorial 5K Run, Bass Guitarist.

Evan Cornelius



EDUCATION

Campbell University, Master of Business Administration (Proposed Applicant), BBA in Trust and Wealth Management, Minor in Financial Planning, Minor in Accounting, Expected Graduation Day: May 2023, Cumulative GPA: 3.311, Top 10 Percent Award, Freshman Alumni Referral, New Presidential Transfer Scholarship, Administrative On-Campus Housing Scholarship, AmeriCorps Scholarship, Kiwanis Club Scholarship, Ruritan Club Scholarship.

WORK EXPERIENCE

Tour guide at Historic Bath Site, Bath, NC, from August 2015 - June 2017. Greeted people at the front desk and answered questions about the area. Gave tours of the Palmer Marsh House and the grounds. Sold the tickets for the tour and other items from the gift shop.

Assisted with special events hosted by Historic Bath Site such as Bath Fest. Assisted two middle schools with tutoring through AmeriCorps from September 2019 - June 2017. Tutored grades 5 through 8 in math. Tutored 8th graders at Northeast Elementary. Tutored 5th, 6th, and 7th grade math at Bath Elementary School. Learned how to work one on one with kids and how to simplify concepts and problems.

EXTRACURRICULAR ACTIVITIES

Accounting Club, Gilbert T. Stephenson Trust Club, Kappa Alpha Order, Vice President of Membership Development on the Fraternity Council, Club Golf, Boy Scouts of America.

Tyler Dail



EDUCATION

Campbell University, Bachelor of Business Administration, Trust and Wealth Management major. Expected date of graduation: May 2022. Overall GPA: 3.855; Major GPA: 3.855; Campbell University Presidential Scholarship; First Citizens Bank Scholarship; Rowland, Gordon B. Trust Scholarship; Thomas, Mildred Davis and Edgar Augusta Scholarship.

WORK EXPERIENCE

Anna's Pizzeria, January 2018-Present. Pizza maker, cook, and food prep. Make and cook pizzas in an organized and timely manner. Greet customers and provide excellent customer service. Food preparation at the beginning of each shift. Cooley's Restaurant and Pub, October 2016-September 2017. Cook and food prep. Food preparation at the beginning of each shift. Cook food in a timely

manner. Provide a pleasant dining experience to all patrons. P&R Property Consulting Group, LLC, June 2016-August 2016. Ensured a reliable presentation of the property for apartment residents by consistently providing grounds support. Maintained the exterior appearance of the property.

EXTRACURRICULAR ACTIVITIES

Boy Scouts of America, 2006-2018. Participated in several service projects in the community. Served as the Assistant Senior Patrol Leader of Troop 75. Lead weekly meetings and planned several camping trips. Earned the rank of Eagle Scout. Future Business Leaders of America, 2017-2018. Participated in local and state business competitions such as financial planning and economics. Attended several business workshops and served in multiple local service projects.

W. Camden Dascombe



EDUCATION

Campbell University, Buies Creek, NC. Master of Business Administration with focus in general business, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected graduation date: May 2022. Major GPA: 4.0, Cumulative GPA: 3.355. Dean's List. Campbell University Scott-Ellis Scholarship, Marvin D. Johnson Trust Management Scholarship, John Hill Trust and Wealth Management Scholarship. The BB&T Leadership Institute - Emerging Leaders Certification.

WORK EXPERIENCE

Truist Financial Corporation, Fiduciary Trust Intern, Online - Remote (June 2020-August 2020). Gained valuable experience in wealth management with a team of Trust Advisors and Fiduciary Executives. Supported several

Advisors on their accounts through clearing of Reg 9 exceptions and handling monetary and non-monetary discretionary requests. Assisted Advisors with general account administration, including the estate settlement process, and remainderman statement notifications. Prepared discretionary requests and presented requests for approval to working group committee. Exposure to all facets of private wealth management through frequent discussion with each department. Developed a proficiency in SEI Trust 3000, Salesforce, CSS, iWork, and SPV. Omega Sports, Shift Supervisor, Morrisville, NC (July 2019-December 2019). Obtained beneficial experience in cash handling. Given additional responsibilities and management experience. Opened and closed store in addition to delegating tasks to team members. Omega Sports, Sales Associate, Morrisville, NC (July 2015-June 2019). Acquired valuable customer service skills through frequent dialogue with many different customers and families. Dutiful, knowledgeable sales associate for 3+ years prior to promotion. Being "Professional Footwear Fit," I was trained specifically to fit customers in right shoe dependent upon their needs and activities. Gained useful marketing skills, setting up and serving several local events as the sole company representative.

EXTRACURRICULAR ACTIVITIES

Campbell University Student Government Association (SGA); Senior Class Representative, Academics Committee Chair (2020-2021); Junior Class

Representative, Academics Committee Vice Chair, Elections Committee Member (2019-2020). Variety of intramural sports. Salem Baptist Church landscape volunteer work.

Angel Evans



EDUCATION

Campbell University, Buies Creek, North Carolina, Master of Business Administration (Proposed Applicant), BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning. Expected Graduation: May 2022. Johnston Community College, Smithfield, North Carolina, Associate of Arts in Pre-Liberal Arts, Graduation Date: May 2020. Received multiple scholarships including: Presidential Scholarship, Federal Pell Grant, North Carolina Needs Based Scholarship, Campbell University Women's Volleyball Athletic Scholarship, and DNU - Administrative On-Campus Housing Scholarship.

WORK EXPERIENCE

Modern Mechanical HVAC LLC, Commercial Accounting Assistant (Garner, North Carolina) 2018-Present. Responsibilities consist of

managing incoming bills and payments, intercompany billing, ensuring our employees maintained access to federal government facilities and bases throughout North Carolina. Maintained pay applications for commercial installations. Worked closely with management to ensure proper purchases of equipment and maintained accurate job costing through Excel. Gained efficiency in operating Wintac scheduling system and QuickBooks Software through a variety of responsibilities.

EXTRACURRICULAR ACTIVITIES

Campbell University Women's Volleyball, Campbell University Campus Outreach, American Legion North Carolina Post 71 Fastpitch Softball Team Captain, Raleigh Dream Center Volunteer of Raleigh, North Carolina, Serve Your City Volunteer, Project 919 Volunteer of C3 Church Clayton, North Carolina, C3 Church Sunday Service Volunteer Clayton, North Carolina.

Joseph Faucette



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management, Minor in Financial Planning, Expected date of Graduation: May 2023, Cumulative GPA: 3.246; Presidential Scholarship.

WORK EXPERIENCE

Huntington, WV, Raymond James and Associates Intern (January 2019). Assisted financial advisors and organized a new filing system for the office. Attended meetings and gained insight into investments and retirement planning. Huntington, WV, Big Green Scholarship Foundation Intern (February 2019). Attended meetings and met with donors to discuss financial opportunities. Prepared budget and itineraries for university athletic team trips. Camden Park (May 2018-

August 2018). Supervised crew members and organized park activities.

EXTRACURRICULAR ACTIVITIES

Rush Chair of the Kappa Sigma Fraternity Sigma-Phi Chapter, Trust and Wealth Management Club, and numerous intermural sports.

Brady Frampton



EDUCATION

Campbell University, BBA in Trust and Wealth Management, 4+1 Masters in Business Administration, Minor in Financial Planning, Expected Graduation Date: May 2022, Scott-Ellis Scholarship, Residence life scholarship, BB and T Business Fellow, Overall GPA: 3.848, President's List, Dean's List.

WORK EXPERIENCE

American Armed Forces Mutual Aid Association (Virtual), June 2020-July 2020, Wealth Management Intern. Researched growing markets in the edge computing and 5G sectors, reading a 200-page Cowen report and presenting my analysis to the whole wealth management division. Created a webinar on Emoney, a software that allows clients to better understand the site and keep track of their finances. Produced a new annual account review process for the relationship managers that would result in a more personal annual review. Campbell University (Buies Creek, NC), Resident Director, July

2020-Present, supervised a group of resident assistants and informed them of all residence life information. Managed Murray Hall and all maintenance requests, questions and paperwork for 101 freshmen males living in the hall. Conducted hall meetings to keep residents informed as to pertinent information. Bernard, Robinson and Company (Dunn, NC), Tax Intern, January to April 2019. Prepared tax documents and returns for clients during the abundantly busy tax season, including 1099's, W2's and all necessary documents to file with the Internal Revenue Service. Assisted clients with financial statement preparation, including trial balance inputting. Collaborated with partner owners of the firm in preparation of returns, as well as group work on returns and firm projects with fellow interns. Completed tax returns for an individual with over ninety business ownerships.

EXTRACURRICULAR ACTIVITIES

Inaugural BB and T Business Fellow, Mentor to freshmen students in their BADM100 seminar class, Member of the Safety Council for the Lundy-Fetterman School of Business, Business owner of Mint Auto Detailing.

David Gaster



EDUCATION

Campbell University, Master of Business Administration (Proposed Applicant), B.B.A. in Trust and Wealth Management, Minor in Financial Planning, Minor In Accounting. 3.5 Trust GPA, Deans List 2020 Expected date of graduation: May 2022; Presidential Scholarship, CU Legacy Award Scholarship, DNU Wade Baptist Church Scholarship, Ball Ned B Business Scholarship, Jonesboro Baptist Church Scholarship.

WORK EXPERIENCE

Chicora Golf Course, Dunn NC, Pro Shop Attendant, March 2019- Ongoing; Organized 72 Player Member Guest Tournament; Collected, Divided and Distributed Calcutta Money; Sat in on Meetings Between Ownership and Management; Led Nightly Closeouts in Cash Drawer and Credit Card Receipts; Elevated

Customer Satisfaction; Assisted Members with Club Customization and Orders, Performed Regular Maintenance of Club shop and Course Property. Quail Ridge Golf Course, Sanford NC, Golf Cart Attendant, May- August 2018; Handled Weekly Golf Tournaments, Performed Cart to Car and Bag Service, Saw to Constant Customer Satisfaction with Value and Experience, Learned Basic Maintenance of vehicles. First Baptist, Sanford NC, Afterschool and Day Care Worker, June 2015- August 2019; Took Care of Upwards of 45 Children, Help Instill Lessons Learned During School, Helped with Daily Exercise, Taught Lessons on Life Skills in a Safe Environment,

EXTRACURRICULAR ACTIVITIES

Vice President and Founding Father of the Marketing Club, Member of the Gilbert T. Stephenson Trust Club, Member of the Finance and Investing Club, Member of the Club Golf Team.

Joseph Giarmono



EDUCATION

Campbell University, BBA in Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2022; GPA: 3.338. Presidential Transfer Scholarship, Phi Theta Kappa Scholarship, Robert Adrian Harris Business Scholarship.

WORK EXPERIENCE

Sonic Drive-in, Elizabeth City, NC (September 2016- August 2019). Assistant manager: Prepared meals for customers. Maintained a shift and place people where they needed to be for maximum efficiency. Collaborated with the store manager in taking inventory. Delegated workers duties so the store would run smoothly. Entrusted that the money is counted by the beginning and end of each of my shifts. Assisted in taking orders from the

customers and if needed resolved any concerns they might have. Trained new workers in different positions around the store.

EXTRACURRICULAR ACTIVITIES

President of the Phi Theta Kappa Honor Society chapter at College of the Albemarle Community College. Member of Phi Eta Sigma Honor Society chapter at Campbell University. Intramural sports. Volunteer for an organization in Elizabeth City, that served people in need.

Peter Gilder



EDUCATION

Campbell University, Masters of Business Administration (proposed applicant), BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning. GPA: 3.34. Expected graduation date of May, 2023. Presidential Scholarship, Southeastern Trust School Trust Management Scholarship.

WORK EXPERIENCE

Aberdeen, North Carolina, Meridian Kiosks, Assembler, June 2019- August 2019. Worked with a group of about ten other people to assemble, prep, and ship kiosks. Communicated ideas for efficiency improvement and helped implement the ideas into the assembly line, fabrication process, and painting process. Led a team of two to assemble an order of 24 units a week ahead of schedule. Southern Pines, North Carolina, Athletic Club of the Sandhills,

Goalkeeper Coach, February 2017- August 2017. Created and ran all the goalkeeper sessions for every age group. Planned and communicated to assistant goalkeeper coach what sessions to run when I was not there. Helped kids set goals and then create plans to achieve their goals. Watched and evaluated games and helped coaches recognize areas for improvement. Southern Pines, North Carolina, The Coalition Resale Shop, Volunteer, December 2016- April 2017. Appraised, organized, and stocked clothes and furniture. Helped customers find clothes and furniture and ran the cash register. Counted and sorted money from sales of that day.

EXTRACURRICULAR ACTIVITIES

Campbell Men's Soccer Team (2018-present)

Taylor Gunter



EDUCATION

Campbell University, BBA in Trust & Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2022. Overall GPA: 3.525. Dean's List, Presidential Scholarship, Administrative On Campus Housing Scholarship, First Citizens Bank Scholarship, Southeastern Trust School Trust Management Scholarship, Scott-Ellis Scholarship, Alumni Referral Scholarship, Teague, Inez Crowder & Charles Houston Scholarship, Fred and Mary Whitefield School of Business Scholarship.

WORK EXPERIENCE

Campbell University Campus Recreation Fitness Supervisor April 2020 - Present. Responsible for supervising a crew of six assigned Campus Recreation Fitness Ambassadors to ensure all policies are followed

for the safety and enjoyment of patrons. Work front and back desk at both Carter Gym and Holding Fitness Center, clean and organize all weights and exercise machines, and provide information and guidance to patrons needing assistance. Attend bi-weekly supervisor meetings to gain information on updates and changes according to Campbell University Campus Recreation policies and events. Work collaboratively with other supervisors on projects to inform students and employees about programs Campus Recreation offers. Lancasters Barbeque and Wings Server May 2019 - March 2020. Greeted guests at tables when they entered the restaurant, took food and drink orders, delivered food to tables in a timely manner by working with the cooks and fellow servers, operated a POS system to place food orders and check out customers to complete their experience. Host/Greeter at Famous Toastery April 2018 - May 2019. Greeted guests, seated guests at available tables, worked the cash register to check out all customers while leaving the restaurant, answered phone calls for to-go orders, placed to-go orders, assisted servers when needed, maintained cleanliness in front of house.

EXTRACURRICULAR ACTIVITIES

Delta Phi Epsilon sorority member (director of finance for fall 2019), intramural sports.

Tyrek Haywood



EDUCATION

Campbell University, Master of Business Administration (proposed applicant). BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2022. Major GPA: 3.18. Full Athletic Football Scholarship, Scott-Ellis Scholarship. 2017 Pioneer Football League Honor Roll. 2018 Big South Conference Presidential Honor Roll. 2017 Athletic Booster Club Scholarship.

EXPERIENCE

Campbell University Student Athlete (Buies Creek, NC) June 2017 - Present. Wells Fargo Trust Administrator Intern (Minneapolis, MN) June 2020-August 2020. Adapted to a remote environment for daily trainings and daily tasks. Assisted Risk Manager with conformation of client authentication. Conducted New Account and Administrative Account Reviews. Revised

and Analyzed depletion of accounts to determine best investment objective. Performed overdraft clearing and money movement from numerous portfolios. Elected to attend Campbell University on a full athletic scholarship. Reacted to complex game situations quickly and effectively. Exercised strong leadership skills and practiced self-discipline on and off the field. Successfully balanced 30 hours per week of athletic activities while managing a demanding academic schedule. Domino's Pizza LLC, Customer Service Representative (Charlotte, NC) May 2014 - June 2018. Was a liaison to the General Manager and Assistant Manager responsible for the delegation of tasks to new employees. Conducted and monitored daily inventory checks. Provided excellent customer service and listened attentively to caller needs to guarantee positive customer experiences. Performed closing duties including deep cleaning kitchen surfaces, storage, and equipment. Greeted customers at counter and received orders, suggesting menu items and add-ons to increase revenue. Trained and orientated new food service workers in the proper food preparation procedures that are followed in the restaurant. Carowinds Amusement Park, Food Service Sales Associate (Charlotte, NC) June 2013 - August 2013. Responsible for in-person customer intake. Helped to acclimate new employees in regard to protocols and restaurant practices. Cleaned all work areas, equipment, utensils, and dishes, in order to ensure they were stored appropriately. Prepared food orders and maintained proficiency at every station. Checked outside dining area before and after peak customer times and picked up trash as needed.

EXTRACURRICULAR ACTIVITIES

Campbell University Football Player, Defensive Tackle (June 2017-Present).

Dwight Hendricks



EDUCATION

Campbell University, Master of Business Administration (Proposed Applicant) with BBA in Trust and Wealth Management, Minor in Financial Planning. Expected graduation: December 2022: Major UG GPA: 3.5. Received the Scott-Ellis Transfer Scholarship (11000).

WORK EXPERIENCE

United State Marine Corps, Camp Lejeune, North Carolina, Administrative Training Non-Commissioned Officer June 2018 - February 2019, Managed 15+ Service Members and location for safety standards, attendance criteria, task management, and accountability results, Submitted training rosters for 20+ individuals from different seminars for completion of necessary promotional requirements resulting in accurate data reporting and timely promotions, Tracked and managed physical standards for mission readiness: 100+ individuals ,Created daily reports containing locations and trainings for 600+ service members assuring their accountability and participation for required trainings using Excel, Adobe, Outlook, and Word, Analyzed accurate reporting for supervisors resulting is efficient use of man power, documentation, and resources, Conducted required Physical assessments for promotion and compliance ratings for 50+ individuals so that necessary supportive measures are implemented as needed, Completed 120+ days of martial arts training consisting of unarming, sustaining, maintaining overly aggressive combatants to remedy/deescalate situations resulting in Marine Corps Martial Arts Program (MCMAP) Brown Belt completion. Field Artillery Fire Control Marine, December 2015- June 2018, Lead team of 5 to 10 individuals to secure team safety and equipment inventory for the purpose of establishing locations and relocations resulting is mission readiness, Directed team of 5 individuals in search and suppress missions during training events, Participated in international humanitarian event supporting local population sustaining safety and basic survival needs, Completed 15+ training operations and competence evaluations preparing humanitarian efforts, Trained individuals on Geographical Technological and Manual systems for effective data control completing missions resulting in optimum results and proficiency, Conducted safety briefs for Geographical Technological Systems for supervisors to achieve accurate data, safety standards, and ideal task completion ,Knowledge necessary to perform as horizontal control operator, vertical control operator, or computer in a tactical fire direction center.

EXTRACURRICULAR ACTIVITIES

Marine Corps Martial Arts Brown Belt, June 2018 – Present, Amateur Jiu Jitsu Blue Belt, June 2016, Amateur Muay Thai, December 2015, Amateur Boxing, July 2018

Hannon Herring



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), Trust and Wealth Management Pre- Law. Expected Date of Graduation: May 2023. Cumulative GPA: 3.429; Dean's List, Presidential Scholarship, and recipient of the Lundy Fetterman School of Business Fellows award.

WORK EXPERIENCE

Cashier, Customer service, at Medical Village Pharmacy, May 2017- July 2019. Properly operated a register along with advanced medical system the pharmacy uses to keep track of all the customer's medications. Answered phone calls from customers and relayed their needs to the pharmacists. Was responsible for managing inventory of pills, filling prescriptions for checking, cleaning the pharmacy, and restocking shelves with drugs

and home goods. Home Constructor, member or Framing Crew for Whitehead Enterprises, June 2020- August 2020. This job was comprised of all components necessary to the construction of building a house or remodeling bathrooms. Recorded measurements, operated saws, used nail guns, and utilized many other essential tools for the job. Participated in demolition, remodeling, constructing, and fine finishing.

EXTRACURRICULAR ACTIVITIES

Boy Scouts of America- Eagle Scout, Public Relations Chair of the Sigma Phi Chapter of the Kappa Sigma Fraternity, and member of the BB&T Business Fellows.

Rachel Jones



EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning. Expected graduation date: May 2022. Awarded the Scott Ellis Scholarship, CU Legacy Scholarship.

WORK EXPERIENCE

Campbell University Academic Advising, Receptionist, (Buies Creek, NC) 2019-Current. Answer questions for students as they come in, route them to their advisor for appointments dealing with classes, majors, or other questions concerning their academic career, and make appointments for students who need future help. Waverly Hematology and Oncology, COVID-19 Screener, (Cary, NC) April 2020- August 2020. Screened patients for common COVID-19 symptoms before

entering into the clinic while also lending help to the front desk for tasks such as check-in, answering patient questions, and helping with preparing paperwork. Hand and Stone Massage and Facial, Spa Associate, (Apex, NC) May 2018-July 2018. Schedule appointments in person or over the phone, walk through the benefits up upgrading the appointment clients were there for, sell memberships and products available in store, and calling clients to offer future appointment opportunities.

EXTRACURRICULAR ACTIVITIES

First Generation Camels Club Vice President, Student Alumni Ambassador, Orientation Leader, Tartan Leader, Campbell Student Freshman Seminar Peer Mentor. Volunteer experience with Thank A Giver (TAG) Day, National First Generation Day, Homecoming check-in, Campbell Community Christmas Store.

Austin Knapp



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning, Expected date of graduation: May 2022; GPA: 3.92. Presidential Scholarship, President's List, Dean's List, BB&T Business Fellow.

WORK EXPERIENCE

Truist Financial Corporation, Fiduciary Trust Intern (Atlanta, GA, Remote), June 2020-August 2020. Responsibilities focused on performing monetary and non-monetary discretionary review processes for accounts distributed directly from trust advisors. Presented monetary and non-monetary discretionary forms for approval of over \$100,000 for the year to team leads and fiduciary executives on weekly regional skype calls. Independently calculated special needs

trust beneficiary distributions for the new fiscal year to ensure that their individual needs are being met. Interpreted data and curated PowerPoint decks of client-advisor information for executive team meetings. Trained in SunTrust Portfolio View systems for accessing clients financial account information for special needs and discretionary team assignments. Uploaded BB&T document images to iWork to help the company move towards a fully paperless business model. Walmart Inc., Lawn & Garden Associate (Webster, NY), May 2019-August 2019. Calculated departmental inventory to fulfill stock room orders for corporate. Personally managed weekly price changes throughout the extent of the facility to encourage consumer spending. Independently conducted point of sales operations for all lawn and garden transactions. Supervised three fellow employees' maintaining the organization and sanitation of the entire garden department. Marketed merchandise around the store for holidays and clearance sales to attract customer purchases. Worked within a dedicated team of three in supervising the safe operation of various company forklift deliveries.

EXTRACURRICULAR ACTIVITIES

BB&T Business Fellows Student Mentor, Aramark Student Food Service Employee, Campbell University Intramural Captain, Running of the Camels 5K Participant.

Dakota Leonard



EDUCATION

Campbell University Trust & Wealth Management with a Pre-Law concentration and minor in Financial Planning. Expected Graduation Date: May 2022. Overall GPA: 3.882. Awarded multiple scholarships, including Presidential Scholarship (\$68,000); Administrative on Campus Housing Scholarship (\$4,000).

WORK EXPERIENCE

Mann, McGibney, & Jordan, PLLC (Raleigh, NC), Administrative Assistant, May 2017 - Present. Introduced a paperless idea of operating to streamline the Post-Closing department. Assisted in the Post-Closing department, including scanning, saving, and shipping loan packages; sending closing documents to the borrowers; and mailing out all post-closing checks/payments found on the

Closing Disclosures; collaborated with senior-level coworkers to introduce ideas for improvement. Assisted the Title-Team with searches and Final Title Policies. Trained other incoming Admins. Abbey Road Tavern & Grill (Fuquay-Varina, NC), Server, December 2018 - Present. Prepare the dining room for customers by rolling silverware, making tea, cleaning the server station, and folding napkins. Protect the establishment and patrons by adhering to sanitation, safety, and alcoholic beverage control policies. Kept up to date with the newest menu options and specials. Holly Springs RAGE Baseball Organization (Holly Springs, NC), Social Media & Web Design Chair, July 2019 - Present. Update the Social Media pages (Facebook & Instagram) with upcoming events or other activities. Reconstructed the website to house the most up-to-date information pulled from the Facebook page and Instagram posts. Home Side Financial (Raleigh, NC), Intern, May 2018 - August 2018. Shadowed multiple employees a couple of days a week. Learned about the mortgage process. Sat in on a few meetings.

EXTRACURRICULAR ACTIVITIES

Phi Delta Theta Fraternity; Treasurer & Fundraising Chair, Campbell University Trust Club; Member, Campbell University Marketing Club; Member.

Alexa Mangum



EDUCATION

Campbell University; Master of Business Administration (proposed applicant), BBS Trust and Wealth Management, Minor in Financial Planning; Cumulative GPA of 2.9 Expected Date of Graduation: May 2022; Presidential Scholarship. Scott-Ellis Scholarship.

WORK EXPERIENCE

Triangle Landscape Supplies. Raleigh, North Carolina. Part-Time 2015 to Present, Receptionist at front desk to help and assist customers. Assisted in bookkeeping to balance check books, tally payroll, reconcile vendor tickets with Accounts Payable/Receivable. Currently, I am working with Heartland Corporation (credit card company) to set up a Point of Sale System while taking over some operations by traveling to each of our four locations to ensure the employees are using our systems, following processes, and training new employees. Dunes Club. Atlantic Beach, North Carolina, Summer 2016, Private Beach Club. Waitress. Breakfast, lunch, dinner, and special events full-time over the summer. Set up formal events with elegance and style. Was a great team member and worked well with everyone to get things done efficiently, professionally, and timely. RPG Solutions (Sold to HUB International, a global insurance firm). Raleigh, North Carolina, Summer 2014 and 2015. Assistant to Samantha Hall to complete office tasks: copy, scan, shred, put company packets together and miscellaneous errands for this Insurance and HR Consulting Company.

EXTRACURRICULAR ACTIVITIES

Delta Phi Epsilon Sorority, Standards Board in Delta Phi Epsilon, CU Yearbook Team, CU Tennis Club, Study Abroad at Edge Hill University in England.

Steven Mangus



EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-Law, Minor in financial planning. Expected graduation date: May 2022. Current GPA: 3.64, Deans list, Recipient of Scott-Ellis scholarship, Sauls Dr Ernest Paskel Business Scholarship, Band performance scholarship.

WORK EXPERIENCE

Door dash Delivery Driver in the Wake County area, Self Employed from July 2020 to Present. Learned to manage and overcome adversity through the delivery course while being on time and punctual. Current customer rating of 5 stars and maintained 100% of deliveries being on time or early. Learned on the go organization skills when taking multiple orders and delivering to multiple unfamiliar places. Keeping organized and concise self-

employment records for tax information. Music and Arts Sales Associate in Cary, North Carolina from May 2019- August 2020. Demonstrated extensive sales and product knowledge as well as polite and useful customer service. Developed professional sales tactics making me a proficient salesman while maintaining proper ethical standards. Arbitrated customer conflicts to resolve any complaints or issues. Worked towards monthly sales goals which resulted in commissions earned. Became skilled in 5 information management systems for rental customers, repair tickets, lesson customers, financing, and general sales. Mastered how to present and secure financial and rental contracts with customers. Participated in seasonal marketing strategies as well as created marketing materials for the store including managing price changes on instruments and gear, posting signage around and outside the store, and memorizing sales scripts to promote marketed products.

EXTRACURRICULAR ACTIVITIES

Phi Eta Sigma National Honor Society. Current member in Campbell Wind Ensemble, Sandhills Wind Symphony and Campbell Jazz Band

William Mann



EDUCATION

Campbell University, Master of Business Administration (Proposed Applicant), BBA in Trust & Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2022; Major GPA: 3.25. Dean's List Spring 2020, Scott-Ellis Scholarship,

WORK EXPERIENCE

Cary, North Carolina, Modern Woodmen Of America Financial Planning Summer Intern 2019. Responsibilities focused on coordinating with various specialized wealth services areas within the Trust and Financial Planning Services. Assisted Financial Managers with creating Financial Plans for clients, creating budget reports, and Retirement Planning. Collaborated with senior level professionals such as risk managers, estate specialists, team leaders, and trust team managers. Helped create group meetings for client acquisitions, and events for existing clients. Custom Quality Carpentry Summer laborer in Durham, North Carolina 2018. Assisted with building and remodeling houses throughout the triangle area. Organized the buying of materials and making profitable budgets for each project. Created programs for residents that enhance the social, educational, community, and personal development of residents. Cyber Skills Computer Support Technician Summer 2016-Present, in Durham, North Carolina. Assisted customers with solving problems related to purchases. Maintained proper inventory throughout each week. Implemented and followed all budget guidelines.

EXTRACURRICULAR ACTIVITIES

Community service volunteer at the Durham rescue mission, and Durham homeless shelter. Intermural Sports

Patience Marshall



EDUCATION

Campbell University, Master of Business Administration (proposed applicant) with BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2023; Presidential Scholarship, Women's Track/ Cross Country Scholarship

EXTRACURRICULAR ACTIVITIES

Campbell University's Track and Field Team (August 2018-Present). Freshman Year (2018-2019): Big South's Women's Outdoor Track and Field Freshman of the Year, Big South's Women's Outdoor Track and Field Outstanding Field Performer, Big South's Women's Outdoor Track and Field Shot Put and Discus Champion, Big South's Women's

Outdoor Track and Field Shot Put Conference Record, 3x Big South Athlete of the Week, NCAA Track and Field East Regional Qualifier, USATF U20 Shot Put Champion, Costa Rica Pan American Games Bronze Medalist. Sophomore Year (2020): Liberty University's Indoor Track Facility Record Holder, Big South's Women's Indoor Track and Field Most Outstanding Performer, Big South's Women's Indoor Track and Field Shot Put Champion, Cammy's Freshman of the Year Nominee, Cammy's Unsung Hero Nominee, Big South Indoor Track and Field Shot Put #2 all time, Athlete of the week 1x. Women's Indoor Track and Field Shot Put School Record, Women's Outdoor Track and Field Shot Put School Record, Women's Outdoor Track and Field Discus School Record.

Christopher Matthews



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2022; GPA: 3.704. Dean's List, Presidential Scholarship, Top 10 Percent Award, Lundy Fetterman SOB Fellows Award, Bank of America School of Business Trust Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Award. The BB&T Leadership Institute - Emerging Leaders Certification.

WORK EXPERIENCE

Wells Fargo Bank, Winston-Salem, NC, Philanthropic Services Intern; June-August 2020. Supported philanthropic client management team by completing annual administrative reviews. Completed account long-name project by revising over 2,500 account names.

Participated in calls with the grant team, charitable remainder trust team, client management team, and with other members of the philanthropic services department. Continued to develop a proficiency in SEI Trust 3,000, Trust Gateway, FileNet, and additional software. National Advisors Trust Company, Summer Intern (Kansas City, Missouri), June-August 2019. Worked under the Trust department, shadowed a chief fiduciary officer, chief client officer, trust administrator, and a trust officer. Analyzed trust documents while determining if the model language was present. Processed discretionary distributions while assessing the risk of making the distribution. Organized and formatted marketable literature to create uniformity in a corporate rebranding effort. Completed various projects which consisted of transferring trust accounts to a progressive situs and preparing and proposing a trust account cash management strategy to executives and bulk transfer project in an effort to capitalize on a progressive trust situs. Attended weekly Trust Department and Risk meetings. Operations Director of VMS Home Oxygen, INC. Manage a group of 4 employees that provide durable medical equipment Assign daily responsibilities to all employees. Supervise performance and define expectations for all staff. Initiated a community portal that allows all employees to post and access shared learning experiences. Review and submit medical billing and insurance filing; including Medicare, Medicaid and various PPO organizations. Established rapport with local physicians and home health agencies to increase target market. Increased referrals by 25% within the first three months. Created word tracks that increased productivity. Established a

procedural template to train new and inexperienced staff. Assist in planning and orchestrating events to aid in the disaster relief efforts in the surrounding community.

EXTRACURRICULAR ACTIVITIES

BB&T Business Fellow, Board member of non-profit organization (My Brother's Keeper of Dunn, NC)

Kylie McDonald



EDUCATION

Campbell University, Master of Business Administration (Proposed Applicant) with BBA in Trust and Wealth Management, Minor in Financial Planning. Expected graduation: May 2023. Overall GPA: 4.0 President's List. Received multiple scholarships including: Presidential Transfer Scholarship (\$23,000); Ned B. Ball Business Scholarship (\$4,000); UTUIA Scholarship (\$2,000); Luther H. Butler Scholarship (\$2,500); SEANC District Scholarship (\$500); SEANC State Scholarship (\$1,000).

WORK EXPERIENCE

Lundy-Fetterman School of Business Student Worker (Campbell University) August 2020-Present. Assist with admissions and event planning to find creative ways to reach prospective students during the COVID-19

Pandemic. The County of Richmond Administrative Office Paid Summer Intern June-July. Gained experience in both the county finance and tax departments. Worked to finalize the new budget prior to its approval by the county commissioners. Gained field experience to further understand the appraisal process. Became familiar with the GIS system. Discovery Place Kids Rockingham Youth Development Intern promoted to Part-Time Creative Play Professional January 2018-March 2020. Worked to create a playful yet inspiring learning environment throughout the museum by leading special programs, events, and science experiments throughout the day.

EXTRACURRICULAR ACTIVITIES

Member of Campbell University's Small Group Bible Study. Attended multiple events/retreats with the Campus Activities Board. Volunteered with Eyes Ears Nose and Paws of Chapel Hill. North Carolina Governor's School East Alumni.

Philip Merritt



EDUCATION

Campbell University, Master of Business Administration (Proposed Applicant), BBA in Trust and Wealth Management-Pre-Law, Minor in Financial Planning: Expected Graduation Date: August 13, 2023; GPA: 3.949. President's List, Presidential Scholarship, Top 10 Percent Award, Lundy-Fetterman SOB Fellows Award, Moen Incorporated Scholarship, Sauls, Dr. Ernest Paskel Business Scholarship.

WORK EXPERIENCE

Campbell University Theatre, 2019-2020. Worked in the Theatre Arts Program, aided in the construction and set-up of set pieces and props, assisted with lighting adjustment, some exposure with light programming, ensured tool safety was followed. Sampson County Assistant District Attorney's Office, 4-week Summer Internship June-July 2017. Shadowed several

Assistant District Attorneys in both District and Superior Court, observed multiple trials and court hearings, responsible for filing case dismissals, reorganized the case filing system to improve efficiency, compiled case files for both the prosecution and defense, expunged expired DNA records.

EXTRACURRICULAR ACTIVITIES

BB&T Business Fellow, Phi Eta Sigma Honor Society

Kevin Mills



EDUCATION

Campbell University, Master of Business Administration (intended applicant), BBA in Trust and Wealth Management/Pre-Law, Minor in Financial Planning. Expected date of graduation is May of 2022. Wake Technical Community College, Associate of Arts with a concentration in Business Administration. Graduated May of 2020 with High Honors; Cumulative Transfer GPA: 4.0, President's List, New Presidential Transfer Scholarship, North Carolina Need Based Scholarship, C.C. Spaulding Alumni Association Scholarship, Swift Creek Alumni Association Scholarship, J.D. Crandall Scholarship.

WORK EXPERIENCE

American Stair Parts, Shop Assistant (Greenville, North Carolina), July 2020-Present. Cut and assembled lumber unique to each

work order. Conducted measurements consistent to shop drawings. Handled deliveries from lumber companies like Garriss Evans Lumber Company. Maintained cleanliness of shop work area. Purpose Driven Showcase Baseball Organization, Baseball Coach (Clayton, North Carolina), June 2019-Present. Developed the physical ability of players aged 14 through 18, while incorporating faith-based principles. Created an inclusive, fun, and competitive playing environment for kids. Mills Mowing [Self-Employed], Landscaper (Greenville, North Carolina), June 2014-Present. Maintained weekly maintenance of 14-15 properties. Performed mowing, mulching, cleaning, and pine straw installation. Hauled debris and fallen trees or scrubs to dumping site. Performed seasonal cleanup as needed. Trimmed bushes and trees using proper pruning techniques. Established rapport with clientele.

EXTRACURRICULAR ACTIVITIES

With Purpose International Missionary; traveled to countries of: Czech Republic, Spain, Germany, and Sweden (June-July 2017 & June-July 2018), Christian Connect Bible Study Club; Treasurer, Wake Technical CC (September 2019-May 2020), Wake Tech CC Baseball Team (August 2018-May 2020), Wake Technical CC Baseball Team; Leadership Council, (January-May 2020), White Oak Missionary Baptist Church; Junior Deacon and Junior Usher - Grimesland, North Carolina.

Jeffrey P. Moore



EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-law. Expected date of graduation: May 2022. Campbell University Scott-Ellis Scholarship Recipient. Pitt Community College, Associate in Arts and Associate in Science. Graduated May 2020.

WORK EXPERIENCE

Neighborhood Team Leader for Political Campaign. Recruited prospective Core Team Members and Volunteers. Managed and led voter registration efforts. Organized canvassing efforts within Pitt County. Organized campaign events. Networked with city and state leaders. Reported metrics to local field staff. Held numerous meetings and Strategy Sessions with Volunteers. Attended Learn, and Lead Leadership Initiative training on volunteer recruitment, voter registration, meet-ups,

digital activism, voter contact, coalitions, and data utilization. Trained new Core Team Members and Volunteers.

EXTRACURRICULAR ACTIVITIES

Greenville City Council Youth Council. Served from 2019-2020. Board Member of the Greenville Youth City Council Budget and Finance Committee; Board Member of the Greenville Youth City Council Government Relations Committee. Made recommendations to the City Council regarding issues affecting the City of Greenville, emphasizing those issues of particular interest to youth. Provided leadership and guidance in matters relating to the youth of the City of Greenville, to individuals, to public and private organizations and agencies. Contributed to the "Adopt-A-Street" initiative. Organized and volunteered in G.A.M.E.P.L.A.Y. program (Police Officers engages with the youth through means of videogames to establish a positive first interaction and discusses the issues, situations, and divisiveness in modern-day America in regard to law enforcement). Piano. Inducted into the National Fraternity of Student Musicians, and the Student Division of American College of Musicians. Awarded Superior at Greenville Piano Teachers Association Competition and Awarded Superior at Greenville Piano Guild Competition at East Carolina University. Honor Societies. Inducted in Pitt Community College Psi Beta National Honor Society in Psychology. Inducted in Pitt Community College Phi Theta Kappa National Honor Society. Offer from Pitt Community College Honor Society of Leadership and Success,

Sigma Alpha Pi. Inducted in D.H. Conley High School National Honor Society. Inducted in D.H. Conley High School Rho Kappa National Honor Society. Inducted in D.H. Conley High School National English Honor Society. Inducted in D.H. Conley High School National Science Honor Society. Inducted in D.H. Conley Beta Club. Youth Group Community Service: Served on the Production Team as a Production Assistant for Opendoor Church - Greenville, N.C. Member of the Leading by Example Small Group to serve in the community. Served at CENC Food Bank - Greenville Branch, Building Hope Community Center, Third Street Community Center, Nursing Home Visitations, Special Olympics. Personal Community Service: Assisted Coaching of Little League Flag Football and Baseball.

Prince Ngwenah



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning, Expected Date of graduation: December 2022, Overall GPA: 3.169. PFL Academic Honor Roll 2017, President's List 2017, Presidential Scholarship, Men's Football Scholarship, Top 10 Percent Award, Administrative on Campus Housing Scholarship, Athletic Book Scholarship, Men's Football Room and Board Scholarship.

WORK EXPERIENCE

Campbell University Facilities Management; General Services Worker, June 2019. Trusted with transporting delicate items around campus, Moving/ Repairing basic furniture, trusted with completing work orders on and off school campus. Campbell University Aquatics Operations; Desk Worker, June 2019. Trusted with money management, Oversaw the pool

check-in process, Communicated with students, staff, and guests about the pool schedule, Always arrived 5 to 10 minutes prior to pool opening, Picks up shifts of other employees.

EXTRACURRICULAR ACTIVITIES

Campbell University Football Team, Trust and Wealth Management Club

Kasey Norris



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2022; GPA: 3.0. Scott Ellis Academic Scholarship, Alumni Referral Scholarship, Lewis M. Annabelle L. Fetterman Scholarship, Bryan, Lanie, and W. Carroll Scholarship.

WORK EXPERIENCE

BADM 200 Mentor (Lundy Fetterman School of Business) July 2018- Present. Mentor business school freshmen throughout their first semester. Provide business school freshmen with social support. Offer feedback and advice on in-class discussion and assignments. Guide business school freshmen with successful goal setting and achievement, time management, confidence and acculturation into a professional environment. Nanny for multiple families in Goldsboro, NC

(2018-Present). Ensured the safety and well being of children of various ages at all times. Assist with daily routines of the family home such as cleaning, cooking, escorting children to and from activities and appointments. Provide care and structured play for all children, while also providing an educational environment. Store manager for Mimi' Boutique and Fine Gifts in Goldsboro, NC (May 2018- Present). Provide a friendly, welcoming greeting to customers as they walk into the store. Managed all transactions accurately including cash and credit. Balanced cash drawer at the end of shifts. Listen to customers' requests and assist them in selecting items that would adhere to their requirements. Reviewed inventory in the store as well as in the backroom. Replenish front items as needed. Accurately unpacked shipments and reorganized shelves to place new items received. Assisted customers with gift cards, exchanges, store credit, and returns. Specialized in wrapping customers' purchases with care and panache. Organized social media posts as well as special events and sales specific to the day or week.

EXTRACURRICULAR ACTIVITIES

Member of Campbell University Alpha Delta Pi Sorority, Finance Specialist for Alpha Delta Pi, as well as Continuous Open Recruitment Chair. Member of Campbell University Female Associated with Business Club. Volunteer at the Ronald McDonald House in Durham, NC.

Christin Oliver



EDUCATION

Campbell University, Master of Business Administration (Proposed Applicant), BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of Graduation: May 2022. Awarded the Presidential Scholarship, Top Ten Percent Award, First Citizens Bank Scholarship, Lewis, Thomas Murray & Shirley Rice Scholarship, Administrative On-campus Housing Scholarship. Academic Honors: Dean's List

WORK EXPERIENCE

Secretary at Oliver's Oil Company, Lumberton, NC (Summer 2020). Assisted customers by phone, learned customer service skills, scheduled appointments for the President, assisted with administrative paperwork, enforced North Carolina COVID-19 regulations within the office. Child Caregiver,

Lumberton NC (2016-2019). Assisted children throughout the summer. Strengthened communication skills with adults and younger aged children. Planned various activities, cooked lunch, and took care of children's basic life needs.

EXTRACURRICULAR ACTIVITIES

Active member of Campbell University's Alpha Delta Pi Sorority (2018-Present), Member of Alpha Delta Pi Sunshine Committee (2019), Collected tabs and visited Ronald McDonald House with the sorority. Local Miss America's Outstanding Teen Organization titleholder (2015-2017) this organization is one of the nation's largest providers of scholarship assistance to young women; Presidential Service Award Recipient Bronze/Silver/Gold level. Founded my personal platform called "C.O.L.E"-Collecting Opportunities for The Lions Club Eyeglasses in honor of my younger brother Cole, who is visually impaired. Through "C.O.L.E" I have collected over 3,000 pairs of eyeglasses for individuals who are visually impaired and living in Developing Countries. Advocated this platform throughout North Carolina, presented at various Lions Clubs, and volunteered at free community Eye-Screenings. Utilized social media to promote "C.O.L.E" and have received eyeglass donations from Mississippi and various other states across the nation (2013-Present). Children's Miracle Network: fundraised over \$12,000. Victory Junction: fundraised \$26,500 with a team of seven and participated in the 5k race located in Randolph County. Duke of Edinburgh

Bronze/Silver Medal Recipient (2015-2016). Recipient Community Service Achievement letter from North Carolina House of Representatives (2016).

Walton O'Neal



EDUCATION

Campbell University; Master of Business Administration (proposed applicant), BBS Trust and Wealth Management, Minor in Financial Planning; Expected Date of Graduation: May 2024; Presidential Scholarship.

WORK EXPERIENCE

O'Neals Drug store, accountant/technician this included working on accounts receivable, daily work, and filling prescription. Organized and completed payment of accounts payable and reconciled the accounts receivable for multiple stores across the eastern part of the state. Level Four Wealth Management internship handled general administration of client accounts within the firm. Responsibilities included opening new client accounts, managing current client accounts, and corresponded with clients

regarding account troubleshooting.

EXTRACURRICULAR ACTIVITIES

Campbell University Men's Club Lacrosse Founding Member.

Travis Peacock



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Expected Graduation Date: May 2022; Cumulative GPA: 3.903. 1 semester Dean's List and 3 semesters President's List. Presidential Scholarship, Top 10 Percent Award, FFA Scholarship, and Keith, Thomas Joseph & Anne Bell Business Scholarship.

WORK EXPERIENCE

Hardee's cashier Erwin, NC (May 2019-June 2019). Organized orders accurately and efficiently. Handled electronic and cash transactions making correct change and counting the cash before/after my shift. Responsibilities included, serving guests, cooking fries, hash rounds and apple turnovers, and cleaning and stocking the dining area and restrooms routinely. Agriculture work, farm hand, (Wade, North

Carolina), June 2011 to August 2018. Collaborated with others to plant, fertilize, care for, harvest, and sell a variety of crops.

EXTRACURRICULAR ACTIVITIES

Coin Collecting, Fishing, Fantasy Football, and helping parents and grandparents with home projects

WILLIAM "BILLY" PHENICIE



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of Graduation: May 2022; GPA 3.1. Scott-Ellis Scholarship, On Campus Housing Scholarship, Out of State Resident Scholarship, South Eastern Trust School Trust Management Scholarship, Marvin Drake Johnson Trust Management Scholarship.

WORK EXPERIENCE

City National Bank-Los Angeles, California (worked remotely due to COVID-19). Worked in the Trust department for 11 weeks over the 2020 Summer. Helped with SNT or Special Needs Trusts. Help with numerous transactions. Met and talked with every department head. Worked with systems such as SEI & CSS, helping with transactions. These help employees access any

personal information you could possibly think of on one's portfolio. Assisted with a project right at the end that mainly focused on diversifying and trying to compact laws and procedures throughout the company. Veritex Community Bank (Houston, TX) 2-3 Week Internship over Christmas Break 2019 in Houston Texas. Worked in specialized group mainly focusing on Loans at different Branch locations around Houston Texas. Met with clients face to face with a member of the team during lunch break for coffee, to discuss portfolios, and loans. Villa Sports (The Woodlands, TX) Director of Men's Summer Basketball League. Supervised score keeping and game/league statistics. Director of Summer Youth Basketball League. Coached practices and games. Taught the fundamentals of basketball to boys and girls ages 9 - 13. Director of Villa Kids Summer Basketball Camp. Supervised 3 coaches who taught basketball to boys and girls ages 7 - 13. Event and Planning Coordinator. Responsible setup/tear-down and guest services during events. July Fourth Parade Volunteer (The Woodlands, TX). Lead Staging Volunteer responsible for organizing floats/bands/participants into the order in which they were to proceed. Women's Shelter Thrift Shop Volunteer (Shenandoah, TX). Sorted donated clothing and cleaned floors/windows.

EXTRACURRICULAR ACTIVITIES

Campbell University Varsity Men's Basketball Team. 2019 Big South Conference Champions. 2019 NIT First Round Participant. AAU Basketball, Houston Hoopstars

and Texas Dream Team. Both teams qualified for the AAU National Tournament in Las Vegas, NV. Woodlands Challenger camp (4 years) hosting mentally and physically disabled students. Wilmington Down syndrome baseball tournament. Traveling, have visited 34 states.

Gerald H. Quinn, III



EDUCATION

Campbell University, Buies Creek, North Carolina. BBA in Trust and Wealth Management, Minor in Financial Planning, Master of Business Administration. Expected date of graduation: May 2022. Cumulative GPA: 3.67. Dean's List, Presidential Scholarship, Southeastern Trust School Trust Management Scholarship, Administrative On-Campus Housing Scholarship.

WORK EXPERIENCE

Hydro Works: Hydroseeding and Erosion Control, Kenansville, NC (May 2018-Present). Field Manager: Traveled and assisted in overseeing jobsites, presented demonstrations for potential contract clients, and operated the equipment needed while spraying the seed. Community Trust and Investment Company, Lexington, KY (June 2019). Job Shadow: Learned day to day responsibilities of a trust officer and

interacted with clients. Highland Furniture, Kinston, NC (May 2017-August 2018). Warehouse Manager: Supervised the warehouse floor, delivered and assembled furniture to various locations and interacted with customers while on deliveries and in the store. Stallings of Kenansville, Kenansville, NC (May 2017- August 2017). Merchandising/Inventory Associate: Assisted customers in store, completed inventory on what was in stock, organized and displayed new inventory and gathered materials to complete orders for customers in the warehouse.

EXTRACURRICULAR ACTIVITIES

Member of Campus Activities Board, Event Chairman of Camel Chapter Ducks Unlimited, Gilbert T. Stephenson Trust Club

Savanna Rocco



EDUCATION

Campbell University, MBA in Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning, Expected Graduation Day: May 2022, Scott- Ellis Scholarship, John Hill Trust and Wealth Management Scholarship, Overall GPA: 3.429, President's List

WORK EXPERIENCE

Wells Fargo Service Team Intern (Minneapolis, Minnesota - Virtual) Intern for the Great Lakes Service Team in Minnesota, June 1st- August 7th, 2020. Read and interpreted Trust documents to ensure efficiently for the future. Assisted other departments with projects to help create consistency throughout the organization. Cooperated in team meetings along with working on team assignments. Aquatic Management Group (Raleigh and Knightdale,

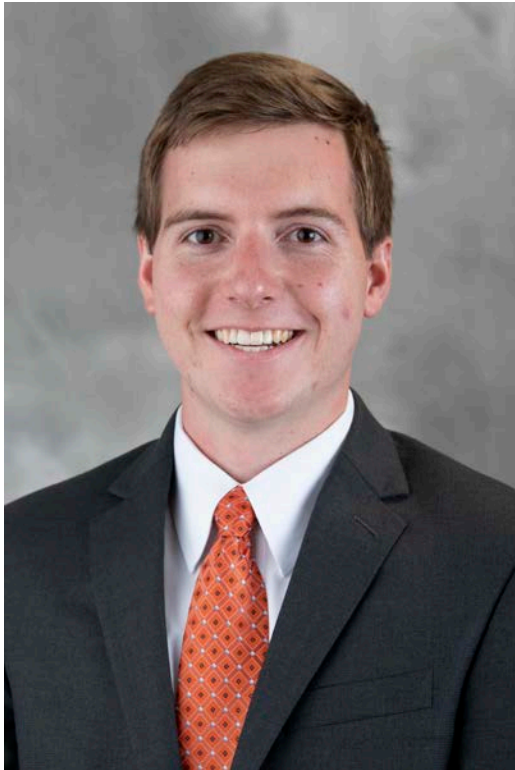
NC) Manager of The Greenway Club at Falls River and the Planters Walk Pools, May-August 2020, 2019, and 2018. I mentored and trained new lifeguards, responsible for the day to day operations of both aquatic centers, responsible for satisfying safety concerns of members and children, and constantly set initiative to create a better member experience. Student Worker for Campbell Athletics (Buies Creek, NC) in Ticket Sales Department, May 2019- Current. Satisfying customer experience, handling profits in the appropriate manner, and dealing with high stress situations Student Worker for Student Success Services (Buies Creek, NC) as a Peer Tutor, January 2019- Current. I mentored and help students be successful in their classes, worked around different learning styles to help make the most successful experience, set precedents for what they should do before class, and provide encouragement in tough topic areas. Wilson Recreation (Wilson, NC) Head Lifeguard and Assistant Swim Instructor, May-September 2016 and 2017. I was responsible to maintain a safe experience for patrons, assisted in making sure all guards were operating at peak performance, and collaborated with instructors to conduct a smooth operating swim lesson. Cipher Escape (Morrisville, NC) Game Master and Receptionist, August 2015 to January 2020. I was a liaison for scheduling cooperate team building events, responsible for resetting and planning game activities, officiate game room assuring a great customer experience, and responsible for opening the beginning and the end of day closing duties. Stanhope Pool (Bailey, NC) Lifeguard and Swim Instructor, May-September

2015. I was liable for patron and security safeness, maintained an orderly and clean pool facility, and performed swim lesson to teach the basics of swimming.

EXTRACURRICULAR ACTIVITIES

Active Member of Alpha Delta Pi Sorority, while serving as Property Manager and Finance Assistant, Treasure for Panhellenic Sororities, VITA Certified Tax Preparer, Order of Omega, BB&T Emerging Leader, Pi Chi Recruitment Counselor

Aaron Schnoor



EDUCATION

Campbell University, Master of Business Administration (4+1), B.B.A. in Trust and Wealth Management, B.S. in Economics, Minor in Financial Planning; Expected date of graduation: December 2022; GPA: 4.0. J.A. Campbell Scholarship, President's List, BB&T Business Fellow.

WORK EXPERIENCE

Wells Fargo Bank, Winston-Salem, NC, Philanthropic Services Intern; June-August 2020. Supported philanthropic client management team by completing annual administrative reviews. Completed account long-name project by revising over 2,500 account names. Participated in calls with the grant team, charitable remainder trust team, client management team, and with other members of the philanthropic services department.

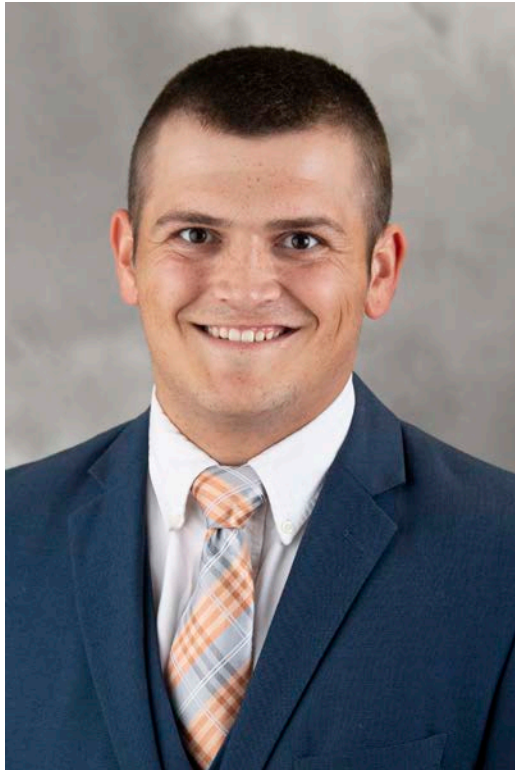
Continued to develop a proficiency in SEI Trust 3,000, Trust Gateway, FileNet, and additional software. City National Bank, Orange County, CA, Trust Administrative Intern; May-August 2019. Assisted in account openings for a trust onboarding project with 51 beneficiaries. Supported relationship managers by providing synopses of trust documents. Completed annual administrative reviews and updated client investment agreements. Drafted discretionary distribution requests for clients, assisting in the daily administration of accounts. Developed a proficiency in SEI Trust 3,000, CSS, IBS, and Document Imaging. Goetzpartners Securities Limited, London, United Kingdom, Intern Analyst; June-July 2018. Researched financial data of specific companies in the medtech, biotech, pharmaceutical, and healthcare industries. Prepared written sector reports discussing products to treat infectious diseases, immuno-oncology, immunology, radiation therapy, wound care, Alzheimer's, and addition fields. Created company presentations focusing on molecular and imaging diagnostics for the Goetzpartners London Compass Seminar. Maintained company investor database by compiling information in Excel, WeConvene, and FactSet sites. Proofread work written by top company analysts prior to publication.

EXTRACURRICULAR ACTIVITIES

Student Body President, Campbell University Student Government Association (SGA);

COVID-19 Health & Safety Task Force Member; SGA Student Body Vice President; SGA Sophomore Class President; SGA Freshman Class President; SGA Student Conduct Committee Member.

David Aaron Smith



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2022

WORK EXPERIENCE

Buies Creek, North Carolina, Campbell University Campus Recreation, Referee/Student Supervisor for Intramural Sports, February 2018- Present, officiate sports teams and regulate gameplay. Adapts to different environments for different sports. Controls the speed of any intramural sport. Supervises officials and reports to the director of intramural sports on how the officials performed. Buies Creek, North Carolina, Southeastern Trust School, Intern, May 31st- June 7th 2019, Assisted patrons with their everyday needs to provide at-home hospitality. Learned the different facets of the trust and wealth

industry by sitting in on sessions with the students of the school as well as the professionals teaching. Wilson, North Carolina (virtual), Truist Fiduciary Corporation, Wealth Department Intern, June 1st- August 7th 2020. Assisted the IRA department with annual reviews as well as client correspondence emails. Learned about ILITS (Irrevocable Life Insurance Trusts) with the ILIT team through client correspondence and document tracking. Met with all the different departments Truist has and learned about what they do and the different applications they use through virtual meetings weekly. Networked through doing various projects for the company and exponentially increased my knowledge through those projects and meetings.

EXTRACURRICULAR ACTIVITIES

Campbell University Vice President of Recruitment for the Inter Fraternity Council.

Frank Sydnor



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management Pre-Law. Anticipated Minor(s) Financial Planning & Accounting. Expected Date of Graduation: August 2022. Scholarship awarded: Scott Ellis Transfer Scholarship. Wake Technical Community College Transfer Cumulative GPA: 3.257; Program GPA: 3.636. Wake Technical CC (WTCC): Associate in Applied Science (AAS): Construction Management Technology: Graduated July 2020 Diploma: Accounting & Finance: Graduated May 2020 Certificate: Business Analytics: Finance Analytics: Graduated May 2020 Certificate: NC State University: Construction Project Management: Awarded: April 2013 Certificate: UNC Kenan-Flagler Business School: Design & Construction: Awarded:

March 2012 Languages: Bilingual in English and Spanish OSHA (Occupation Safety & Health Administration) 30-hour Safety Professional Certificate: May 2014-Present American Welding Society (AWS) Certified Welder: 2011 Present

WORK EXPERIENCE

Builder: Construction Manager: began working in various skilled building trades to include: carpentry, masonry, and welding. Promoted in various job capacities: started as apprentice, then promoted to technician, to foreman, to estimator, to construction manager. Responsibilities include managing operations, estimating, business development, scheduling and budgeting with focus in the remodeling markets.

EXTRACURRICULAR ACTIVITIES

Community in Schools Volunteer Mentor Award: Millbrook High School: Raleigh, NC: 2011-2012 Academic School Year: work with student grades 9-12 to encourage focused learning in STEAM (Science, Technology, Engineering, Arts, Math) subjects including skilled building trades leading to their successful graduation from high school to transferring to community college and/or university. Continue to volunteer in various community improvement programs.

Landon Tate



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected Date of Graduation: May 2022. Current GPA: 3.873. Scholarships Include: Presidential Scholarship, Lundy Fetterman SOB Fellows, Top 10 Percent Award, Campbell Honors Program Housing Scholarship, Federal Pell Grant, Duke Tuition Contribution. Academic Awards: Deans List (3 Semesters), President's List (1 Semester). Certifications Acquired: BB&T Emerging Leaders Certificate and Brian Hamilton Foundation's Starter U Certificate. North Carolina State Licenses: North Carolina Auctioneers License.

WORK EXPERIENCE

Granville Auction Company, Co-Owner, (Oxford, North Carolina) July 2020-Present. Collaborated with my business partner to incorporate Granville Auction Company. Regularly seek new consignments, advertise for auctions, bid call, and track financial records for Granville Auction Company. NC Game On Sports, Site Director (North Carolina), June 2017-Present. Assist coaches, umpires, and parents in understanding rules and regulations of baseball. Provide advice to kids and coaches on sportsmanship and field conduct. Facilitate baseball complexes to ensure tournaments run smoothly. City of Oxford, Field Maintenance Team Member, (Oxford, North Carolina), February 2016-June 2017. Prepare baseball fields for safe and fair play. Perform routine maintenance around the baseball complex. Sanitize facilities to promote safety and maintain a satisfactory park. Larry Adcock Builders, Manual Laborer (Family Owned Business), (Berea, North Carolina), September 2015-Present. Operate tools and machinery such as tractors, dump trailers, and nail guns. Backfield around newly constructed homes. Install doors and trimming to add texture to the interior of new homes.

EXTRACURRICULAR ACTIVITIES

Volunteer Fire Fighter (Berea, North Carolina), Campbell University Honors Program, Campbell University BB&T Business Fellows Student Member, Ducks Unlimited Camel Chapter Secretary.

Lowell Taylor



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2022; GPA: 3.615. Presidential Scholarship, Seby B. Jones Family Foundation Scholarship, Southeastern Trust School Trust Management Scholarship, Administrative On-Campus Housing Scholarship, Lundy Fetterman School of Business Business Fellows Scholarship, Lewis M. & Annabelle L. Fetterman Business #2 Scholarship, Willis and Marguerite Gupton Scholarship, Dr. Ernest Paskel Sauls Business Scholarship, James M. Currin Sr. Scholarship, Jeffery B. & Linda H. Turner Business Scholarship, Outside Scholarships, President's List, Dean's List, BB&T Business Fellow, BB&T Leadership Institute: Emerging Leaders Program, 8th Annual Academic Symposium Poster Presentations 2018 Winner.

WORK EXPERIENCE

Truist Financial Corporation, Orlando, FL (Remote). Fiduciary Trust Intern; June 2020-August 2020. Participated in weekly/monthly Governance Committee meetings (Fiduciary & Trust Committee; Truist Wealth Committee; Manager Evaluation Group Committee). Job shadowed with Head of Wealth Planning and Advice Delivery, Fiduciary Executives, Ultra High-Net-Worth Advisors, Wealth Planning Strategists, Estate Planning Strategists. Created autonomous recordkeeping for Wealth Planning Managers. Assisted with client-based reporting displaying all areas of individual client wealth and needs. Converted varying client reports, PowerPoint decks, and statements to the new Truist format. Southern Bank and Trust Company, Mount Olive, NC, Credit Operations Intern; May 2019-August 2019. Participated in monthly Governance Committee meetings (Executive Committee of the Board of Directors; Audit Committee; Compliance and Community Reinvestment Act Committee; Loan Review Committee; Credit Risk Committee; Asset Liability Management Committee). Job Shadowed with Director of Investment Services, President, CFO, CAO, COO, CCO. Assisted with Federal Home Loan Bank Audit. Completed internal audit of two new ARM loan products. Assisted with data verification in the Loan Booking Department. Rouse Funeral Home, La Grange, NC, Funeral Home Assistant; January 2013-January 2017. Performed daily operations including order fulfillment and supplying materials. Assisted in personalization and installation of monuments.

Communicated with families to personalize funeral services and ensure customer satisfaction.

EXTRACURRICULAR ACTIVITIES

Gilbert T. Stephenson Trust Club, Finance and Investing Club, Ducks Unlimited- Camel Chapter.

Keshawn Thompson



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation; May 2022, Overall GPA: 3.345, Campbell University Presidential Scholarship, Campbell University Athletic Scholarship, Dr Ernest Paskel Sauls Business Scholarship, Wells Fargo Trust and Wealth Management Scholarship, Southeastern Trust School Trust Management Scholarship, Thomas Jack Lynch Scholarship.

WORK EXPERIENCE

Raleigh, North Carolina, Northwestern Mutual, Financial Representative Intern, Discussed financial plans and insurance needs with clients. Had weekly phone calls with potential clients. Met with clients weekly. Attended case studies. Acquired NC Life and Health Insurance license. Attended weekly training of language, financial knowledge, and insurance plans. Involved in joint work with other representatives. Hillsborough, North Carolina, Vietri Inc, Warehouse Assistant and Sales Associate, May 2019. Assisted team members with daily tasks such as stocking equipment, greeting customers, boxing goods, and transporting goods to the customer's vehicle. Collaborated with managers and team leaders in organizing the sales floor. Developed communication and organizational skills. Reported customer suggestions, comments and complaints to appropriate management. Promptly and accurately respond to customer requests to research product availability, price and quality issues. Mebane, North Carolina, Sports Endeavors Inc, Shipping Department Associate, June 2018 - July 2018. Gathered items for online customer orders. Printed off shipping and return labels for all orders. Packaged orders and made final checks before shipping them off. Checked and adjusted inventory daily. Communicated with the receiving and embroidery department about inventory checks. Hillsborough, North Carolina, Food Lion, Grocery Associate, November 2016 - 2017. Performed daily inventory checks. Sorted and stocked inventory along with team members. Reviewed documentation of receipt, storage, and display/distribution of store products. Labeled unit items accurately with price tags and reconciled price discrepancies. Recorded all deviations from standard operating procedures and reported promptly with defined quality assurance standards and the company's quality management system.

EXTRACURRICULAR ACTIVITIES

Program Coordinator of Radical Athlete and Student Oasis Ministry, Campbell University Football Player, Campbell University Small Group Bible Study, Beyond Expectations Organization Volunteer, Mustard Seed Community Garden volunteer, Speaker at the 2019 College Prep Summit, Volunteer for My Brother's Keeper Summit. Enjoys mentoring and coaching students at Orange High School.

Thomas Webster



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning; Anticipated graduation date: May 2022; GPA 3.52; Presidential Scholarship, Southeastern Trust School Trust Management Scholarship, Milam, Sandy Quakenbush Scholarship, Top 10 Percent Award, Dean's List

WORK EXPERIENCE

Cleveland Auto Spa, Linesman (Garner, NC), June 2017-Present. Washed exterior vehicles body, applied topcoat or polish and detailed interior, utilizing equipment and tools. Collaborated with coworkers to ensure smooth workflow and efficient organization operations. Maintained compliance with compliant standards to perform all maintenance activities. North Carolina Umpire Association, Baseball

Umpire (Raleigh, NC), April 2014-Present. Applied game rules and regulations when making calls. Clearly fielded questions from athletes and coaches regarding specific scenarios and calls. Stayed composed and professional in high-pressure and emotionally charged situations with coaches, players, and fans. Monster Indoor Batting Cages, Sales Associate (Clayton, NC), August 2015-May 2018, Assist customers with questions, problems, and concerns in person as well as via telephone. Assist with inventory management. Perform weekly price changes and merchandising duties. Process delivery and store pick-up orders.

EXTRACURRICULAR ACTIVITIES

Kappa Alpha Order Fraternity at Campbell University, Brotherhood Chair. Intramural slow-pitch softball.

William Wells



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2023. Cumulative GPA 3.271; Presidential Scholarship, Jane Graham McKay and Katherine Hill McKay Scholarship, Top Ten Percent Award, James A Campbell Scholarship Competition Attendee Award.

WORK EXPERIENCE

Lowes Outside Lawn and Garden Seasonal Worker (May 2019-August 2019). Assisted customers with selecting correct parts for outside work equipment. Ordered custom items through the Genesis computer system. Loaded garden products for customers as well as advised on correct selection of products. Keith Hills Golf Course Cart Attendant (May

2020- Present). Clean and maintain golf carts, monitor range facilities, repair minor golf cart mechanical issues. Byrd's Pool Services (May 2018- August 2018). Responsible for preserving quality of personal pools, measured chemical levels in pools and made proper chemical adjustments. Operated in a team to install inground pools and liners.

EXTRACURRICULAR ACTIVITIES

Trust and Wealth Management Club, Rush Chair (2019) and Grand Master of Ceremonies (January 2020-Present) of the Kappa Sigma Fraternity- Sigma Phi Chapter, avid outdoorsman, and various intramural sports.

Levi Wiggins



EDUCATION

Campbell University; Master of Business Administration (Proposed Applicant); BBA Trust and Wealth Management; Minor in Financial Planning; Expected Date of Graduation: December 2021; Cumulative GPA: 3.235; Scott-Ellis Scholarship; Rowland, Gordon B Trust Scholarship; Men's Football Room and Board.

WORK EXPERIENCE

Raleigh, North Carolina, Northwestern Mutual, Financial Planner/Insurance Agent, May 2019-July 2019. I got the chance to develop networking and business relationship skills, acquired my securities registration and state licenses for life, health and accident insurance. I later began conducting business meetings with potential clients and gained the opportunity to try out/get a head start on a career as a financial representative. Birmingham, Alabama, Farmers

Insurance, May 2015-July 2018, Marketing/Sales Assistant with daily tasks including assist clients by answering and routing incoming sales and claims phone calls and assist agent with field underwriting for residential and commercial property. I also had the opportunity to collaborate with team leaders and agency owner to develop marketing plans for prospects and existing customers.

EXTRACURRICULAR ACTIVITIES

Phi Eta Sigma Honor Society; Student-Athlete Advisory Committee (SAAC); Diversity and Inclusion Head Chairman for SAAC; NCAA Division I Men's Football; Bass Fishing.

Nolan Wiggs



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2022. Cumulative GPA 3.82; Major GPA 4.0; Presidential Scholarship, Lamm, Floyd Lee & Minnie Deans Scholarship, Top Ten Percent Award, Lundy Fetterman BB&T Business Fellows. President's list(2), Dean's List(2).

WORK EXPERIENCE

State Employees Credit Union (SECU) Intern Summer 2020. Reviewed and authorized the use of power of attorney and clerk of court documents for internal use, created synoptic records for trusts, reviewed discretionary distributions, determined SECU's role in trusts and wills, attended estate planning meetings with members, and shadowing experience. Trust

Education Foundation Southeastern Trust School (SETS) Student Assistant Summer 2019. 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. Welcomed and greeted SETS students. Attended SETS Sessions. Wilson Recreation and Regency Athletic Club, Lifeguard (June 2016-August 2018). Established a safe environment for swimmers, maintained cleanliness and quality of the pool, Responsible for opening and closing the pool. Chain Link Fence Contractors, Fence Installer (June 2013-April 2020). Ensured quality customer service and satisfaction, completed logistics concerning fence material and quantity needed for each project, and operated in a team to install fences.

EXTRACURRICULAR ACTIVITIES

BB&T Business Fellows, Campbell Business Leaders/Leadership Development, Trust and Wealth Management Club, Grand Scribe, Scholarship, and T-Shirt Chair of the Kappa Sigma Fraternity- Sigma Phi Chapter, IFC Delegate, and various intramural sports.

Austin Williams



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: December 2021; Overall GPA: 3.90; current holder of the NC Life Insurance License and the NC Health Insurance License; Presidential Scholarship, Top Ten Percent Scholarship, Business Fellow Scholarship, Todd R. and Elva Scarborough Trust Management Scholarship

WORK EXPERIENCE

Camp Counselor at Calvary Church (Winston-Salem, NC) from June 2018- August 2018: led and organized devotions for the campers; conducted athletic activities to ensure a fun and safe environment; guided large groups of campers on field trips; enabled kids to grow socially and spiritually. Intramural Sports Referee at Campbell University Campus

Recreation (Buies Creek, NC) from August 2019-November 2019: assisted in tracking and logging statistics during intramural games; officiated and regulated gameplay to enforce rules and to maintain the safety of players. Fitness Desk Attendant at Planet Fitness (Holly Springs, NC) from November 2019-March 2020: enforced rules and guidelines among members to promote the Planet Fitness culture; sanitized and maintained the cleanliness of the gym by thoroughly cleaning the facility with the focus primarily on gym equipment; provided exceptional customer service among current members in regard to membership status and financial information while also helping new members with their onboarding process. Life Insurance Broker at 360 Financial Group LLC (Raleigh, NC) from June 15, 2020-July 31, 2020: specialized in Final Expense/Burial Insurance assisting those with low or fixed incomes aged 50-85 with policy amounts ranging from \$5000- \$25000 in coverage; protected low income families from the financial burden that funerals can cause by adequately assessing their life insurances need; focused on writing new business and replacing current policies in which a client was overpaying or perhaps didn't have the benefits that the plans I sold offer, including nursing home confinement, accidental death, and terminal illness riders; wrote 8 life insurance applications totaling approximately \$8,250 in annual premium.

EXTRACURRICULAR ACTIVITIES

student success coach, Kappa Sigma Fraternity Member (Community Service Chair-2019, Social Chair-2020), Intramural Basketball, Business Fellow's Program

Garrett Wilson



EDUCATION

Campbell University, BBA in Trust & Wealth Management, Minor in Financial Planning. Expected Graduation Date: May 2022. GPA: 3.308. Presidential Scholarship, The Luther H. Butler Scholarship for NC Baptist Students, Southeastern Trust School Trust Management Scholarship, Dean's List.

WORK EXPERIENCE

Wilson Financial Group Intern, May 2019-August 2019 and May 2020-August 2020. Aided the advisor in preparing reviews with clients. Assisted with marketing by creating ads to be sent out to prospects. Tasked with the development of a webinar program and helped clients with any issues or concerns they might have. NCYSA referee September 2019-April 2020, I was a referee for youth soccer games, was both a center referee and a

linesman. Freedom 4WD, January 2018-2019, Assigned as a junior technician who assisted in the installation of aftermarket parts and was over detailing the vehicles after the work had been completed.

EXTRACURRICULAR ACTIVITIES

Zeta Psi chapter of Kappa Alpha Order at Campbell University, Number VI, Purser (December 2019 - Present). Muscular Dystrophy Association Fundraiser with Kappa Alpha Order at Campbell University. Intramural dodgeball and flag football. Highway cleanups with Kappa Alpha Order.

Christopher Yoder



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May of 2022. Recipient of Campbell University Presidential Transfer Scholarship. Cape Fear Community College, Associate in Arts, Honors Program, May 2018

WORK EXPERIENCE

Adams Soap Wholesale, Manufacturing Associate, (August 2018-Present), Duties included Manufacturing: Bath Bombs, Sugar Scrubs, Coffee Scrubs, and Shower Steamers. Experimented with manufacturing process to create new products and variations of existing products, including different colors and scents. Packaging Bath Bombs, Lip Balms, Lotions, and customized packaging for customer's orders. Fulfill custom orders of Powder room products. Took on management duties when new managers were trained to keep the department running efficiently. Moe's Southwest Grill, Team Member, (May 2013-August 2013). Assisted managers to create weekly schedules, ordered necessary supplies needed for weekly activities, ran line duty and assisted customers with orders.

EXTRACURRICULAR ACTIVITIES

Member of CFCCs Honor Society (2016-2018). Travel through North Carolina and play worship music for different churches. Coached and Mentored the Fuquay Varina travel football team to a championship.

Sedeq Younger



EDUCATION

Campbell University, Master of Business Administration with focus in General Business, BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning. Expected date of graduation: May 2022; Overall GPA 3.41; Major GPA 3.75. Dean's List, Campbell University Scott-Ellis Scholarship, Administrative On Campus Housing Scholarship, Stephen Ross Angel Scholarship, Southeastern Trust School Trust Management Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, Danny and Barbara Roberts Undergraduate School of Business Endowed Scholarship, Fred and Mary Whitfield Undergraduate School of Business Scholarship, BB&T Emerging Leaders Certification

WORK EXPERIENCE

Advocacy Trust LLC, Trust Fiduciary Intern, online-remote (Mooresville, NC) May 2020-July 2020. Presided over a real estate project that involved arranging Drive-By Inspections for more than one hundred accounts. Assisted with each aspect of the inspection scheduling process. Created and updated several Microsoft Excel spreadsheets to properly track inspections. Worked toward goals and objectives through the real estate project as defined and assigned by management. Performed developmental tasks under the guidance of the Senior Traditional Trust Manager. Office Depot Sales Associate/ Logistics Personnel (Greensboro, NC) May 2018-August 2020. Engaged and provided an exceptional customer service experience. Demonstrated passion for the brand, products, services and solutions offered to our customers. Utilized advanced selling skills and knowledge to meet the customer's needs. Assisted team members with inventory management and adjustments. Provided new employees with important information and resources as a part of training procedures. Maintained a safe and clean working environment.

EXTRACURRICULAR ACTIVITIES

Campbell University Student Government Association (CUSGA); Senior Class Vice President (2020-2021), Finance Committee Member (2020-2021), Academics Committee Chairman (2019-2020), Junior Class Representative (2019-2020); Black Student Association Member (BSA), 2019-2021; Volunteered at Beacon Rescue Mission in Dunn, North Carolina, Intramural Sports