



**CAMPBELL**  
**UNIVERSITY**

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Lundy-Fetterman  
**School of Business**

**Trust & Wealth Management**

**2020 - 2021**  
**Permanent Hire**  
**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.

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Jared Arp  
Jessica Carter  
Kyrissa Cumbie  
Ashley Dyer  
Anna Hall  
Stephen Harrelson  
Calvin Hayford  
Logan Heintzman  
Noah Helms  
Corrina Hubbard  
Nathan Jester  
Sarai Jordan  
Richard Warren King Jr.  
William Knabe  
Matthews Knortz

Nicolas Lamorte  
Kevin Laureano  
Luka Lazarevic  
Nathaniel McClintock  
William McLemore  
Andrew Morgan  
J. Blake Phillips  
Danielle Randolph  
Zach Roderick  
Tucker Smith  
Gerrit Van Schalkwyk  
Alana Swett  
Campbell Tarpey  
William Yates

## Jared Arp

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### EDUCATION

Campbell University, Master of Business Administration (candidate), BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2021. MBA GPA 3.684; Overall GPA 3.081; Campbell University Scott-Ellis Scholarship; Campbell University Thomas H. and Judith O. Folwell Trust Management Scholarship.

### WORK EXPERIENCE

Wells Fargo Intern Summer 2020. Worked for Wells Fargo Estate Settlement team. Attended account review meetings, as well as, assisting in the handling of estate settlement accounts for the Wells Fargo Trust Department. City National Bank (DTLA) Intern Summer 2019. Assisted in discretionary/administrative reviews for CNB Trust Department. Attended meetings and assisted Trust Officers with conducting day to day administrative responsibilities. Attended client meetings, as well as reviewed discretionary language for City National Bank Trust accounts. Trust Education Foundation Southeastern Trust School (SETS) Student Assistant Summer 2018. 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. 2019 Campus Recreation Supervisor. Assessed/reformed performance of Campus Recreation employees. Organized/conducted Campbell University intramural activities. Till & Butler CPAs Intern Summer 2018. Assessed and organized client accounts and files. Scanned and organized documents. Observed client relationship meetings and conference calls. Arp Landscaping Company (owner) August 2016 - August 2018. Provided landscaping services. Developed and maintained customer relationships. Invoiced customers. Old South Apparel Spring Addition Clothing Model Spring 2018. Highland Country Club January 2017 - April 2017. Greeted members and prepared equipment for play. Escorted patrons for private and group golf lessons. Assisted with tournament set-up and operations and vendor demonstrations. Course facilitator responsible for course set-up, clean-up, and driving range inventory. Chick-filA September 2015 - December 2016. Front-store and drive-thru Team Member. Greeted customers. Processed orders. Worked cash register. Assisted with daily store closing operations. Represented the Chick-fil-A brand.

## EXTRACURRICULAR ACTIVITIES

Campbell University - Vice President, Greek Life Programming Board. Worked with school administration to plan, organize, and execute campus-wide events. Represented the University at the Association of Fraternal Leadership National Conference. Managed budget for Campbell University Greek Week. Presented at Freshmen Orientations and welcomed incoming students. Student Ambassador, Lundy Fetterman School of Business. Organized visitations for potential students on behalf of Trust Department. Provided presentations and campus tours to potential students Rush Week and Social Chairman, Kappa Sigma Fraternity. Freshman Class Representative, Student Government Association. Team Member - Campbell University Intramural Sports.

## Jessica Carter

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### EDUCATION

Campbell University, Buies Creek, North Carolina, 4+1 Master of Business Administration, BBA in Trust in Wealth Management Pre-Law, Minor in Financial Planning, GPA: 3.462, Expected Date of Graduation May 2021, Presidential Scholarship. Dean's List. President's List

### WORK EXPERIENCE

Student Activities Graduate Assistant (Buies Creek, NC) August 2019-Present. Oversees campus clubs, organizations, and Student Government with the Director of Student Activities. Manages multiple tasks such as event planning, supervising events, and running proprietary software. Point of contact for student groups. Wells Fargo Fiduciary Administration Intern (Remote) June 2020 - August 2020.

Worked closely with senior fiduciary managers and administrators to help administer trusts. Reviewed accounts for W-9s, statements, compensations, etc. to ensure compliance. Learned to efficiently use Wells Fargo operating systems such as SEI, Accurint, and FileNet. Worked closely with senior fiduciary managers and administrators to complete ongoing projects. Used Microsoft Office skills to complete projects assigned to me which included gathering W-9s for all payees. Improved communication skills, increased knowledge of fiduciary office operations, and gained extensive trust knowledge. BPAS Trust Intern (Utica, New York) May 2019-August 2019. Set up and managed retirement plans for clients. Analyzed and maintained funds and data in client plans. Ensured time frames were met. Kept in contact between clients and departments, especially regarding the implementation process. Browder Overby Law Office Legal and Trust Intern (King, NC) June 2018-July 2018. Provided support for Will signings and Real Estate closings. Reviewed DSS and Custody cases for Partners and shadowed them throughout the trial process. Archived and maintained case files in an orderly manner

### EXTRACURRICULAR ACTIVITIES

Panhellenic Council President, Delta Phi Epsilon Sorority, Phi Eta Sigma Honor Society, Order of Omega Honor Society

## Kyrissa Cumbie

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2021. Overall GPA 3.89; Presidential Scholarship, Top Ten Percent Award, Legacy Award, Eastern Star Scholarship. Ned B. Ball Business Scholarship, Lundy Fetterman SOB Fellows

### WORK EXPERIENCE

Manager of Rush Hour Escapes in Fuquay-Varina from March 2017 to March 2020. Designed alluring flyers targeting team building for local businesses as well as the general public. Assisted in establishing and maintaining a Facebook presence, including promotional advertisements. Aided with advertising by promoting the business through Facebook ads, Mailchimp, and Snapchat ads. Managed the company booth at local street fairs. Shared

promotional content through videography and photography on various forms of social media. Provided insight to customer inquiries in person and over the phone. Completed other administrative tasks on a daily basis. Personal trust intern at Wells Fargo in Winston-Salem from June 2020 to August 2020 (virtually). Performed daily administrative tasks such as completing AARs and overdrafts. Corresponded with investment managers to raise cash to clear an overdraft. Performed TMM/TMT tasks for trust accounts, including updating SEI coding. Listened in on client calls. Calculated a client's life expectancy for purposes of deciding whether to terminate. Completed DARs along with their depletion analyses. Performed address change authentications by contacting the client and using KBA then updating the client information on SEI. Drafted and sent notices of resignation, closing letters, as well as CNL letters to clients. Reviewed and completed small trust terminations for the SAO Project. Completed FITT, Review for Resignation, and Authorization to Terminate forms. Filed fee loss reports. Assisted in creating infographics illustrating the different types of product offerings available to clients. Created an internal presentation comparing CTFA and CFP certifications. Completed the OSR Project which focused on getting beneficiaries of class action proceeds their money. Assisted with IFS Product Definition and IFS Baseline Services projects with individuals from the west coast branch. Consisted of defining the products as they uniquely relate to each department, therefore removing any overlap, as well as, compiling the services clients receive regardless of the account type.

## EXTRACURRICULAR ACTIVITIES

Member of the BB&T Business Fellows Program. Intramural sports.



## Ashley Dyer

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### EDUCATION

Campbell University, Buies Creek, North Carolina, Master of Business Administration with a focus in financial services, BBA in Trust in Wealth Management Pre-Law 4+1, GPA: 3.9, Expected Date of Graduation May 2021; Presidential Scholarship, Newkirk Family Trust Management Scholarship. President's List, Dean's List, Phi Eta Sigma Honors Society, Phi Kappa Phi Honors Society.

### WORK EXPERIENCE

Investment Assistant (AAFMAA Wealth Management and Trust-remote) August 2020-present. Maintain Regulation 9 approved list on Fi-Tek. Generate weekly reports on Clearwater Analytics Software categorizing internal accounts by asset class and industry sector. Conduct minutes for Investment Policy Committee meetings. Generate performance reports on Informa software to send to clients. Wealth Management Intern (AAFMAA Wealth Management and Trust-remote) June 2020-July 2020. Developed and presented investment strategies for a potential market to the Chief Investment Officer. Created a financial planning webinar for members to easily understand and navigate EMoney. Conducted a thorough competitive analysis to enhance marketing penetration. BADM 100 Mentor (Lundy Fetterman School of Business) July 2018-December 2019. Assist freshmen throughout their first semester. Mentor business school business school freshmen in making a successful transition from high school to college. 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. Student Success Writing Tutor (Campbell University) January 2017- July 2019. Assist students in formatting and editing academic papers. Collaborate with other tutors in perfecting my writing skills. Communicate with students on how to improve their writing. Work with professors in educating students on various formatting styles. Responsibilities included fixing grammatical errors, citation issues (both in-text and works cited pages), spelling errors, problems with sentence structures, and issues regarding paragraph/page length.

### EXTRACURRICULAR ACTIVITIES

Point Church Care Center volunteer. Pisgah Legal Services volunteer



## Anna Hall

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2021. Awarded the Presidential Scholarship, Florence McDonald Lee & Milton Owen Scholarship, Top Ten Percent Scholarship, Alumni Referral Scholarship, Dr. Ernest Paskel Business Scholarship, Harnett County Resident Scholarship, Andrew Brooks Memorial Scholarship, Louis G. Joseph Memorial Scholarship, Friends Fighting Cancer Scholarship. Academic Honors: Dean's List

### WORK EXPERIENCE

Campbell University BADM 200 Mentor (Buies Creek, NC) January 2019-May 2020. Served as a liaison between the professor and students, assisted students in building a resume, directed students with class projects and assignments, assisted the professor in lecture. Campbell University Nathan Johnson Memorial Natatorium, Swim School Instructor (Buies Creek, NC) June 2015-August 2018. Assisted team members with maintaining a safe work environment, completed logistical paperwork, and taught requested swim lessons. In-Home Child Care Services (Harnett County Area) April 2016- Present. Assisted children in their basic daily needs. Gained communication skills with both parents and children. Responsible for maintaining a safe environment for the children and preparing activities for each child to complete.

### EXTRACURRICULAR ACTIVITIES

Student Government Association Executive Commuting Students Coordinator, Student Government Association Student Affairs Committee, Student Government Association Advancement Committee Member, Student Government Association Dance Marathon Committee Member, Student Government Association Sophomore Class Representative, Student Government Association Freshman Class Representative, Campbell University Orientation Leader, Attended Harvard School of Business Social Entrepreneurship Conference, Attended Carolina Women in Business Conference, Member of Females Associated with Business Club, Lundy Fetterman School of Business Leadership Development Program Nominee, Served as Governors Page for Governor Roy Cooper, Served as Senate Page for Ronald Rabin, Operation Christmas Child volunteer, First Baptist Church of Erwin children's church leader, First

Baptist Church of Erwin Youth social media coordinator, First Baptist Church of Erwin media team member.

## Stephen Harrelson

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### EDUCATION

Campbell University, Masters of Business Administration (Candidate), B.B.A in Trust and Wealth Management, Minor in Pre-Law; Expected Graduation: May 2021. Overall GPA: 3.9; Major GPA: 4.0, Dean's List (3 semesters); President's List (3 semesters); Presidential Scholarship; Newkirk Management Trust Management Scholarship; Dorothy Williamson and George McLaney JR Scholarship (Twice); Southeastern Trust School Trust Management Scholarship; T Harry Gatton Trust Scholarship (Twice); Phi Eta Sigma National Honors Society; Phi Kappa Phi National Honors Society; Marvin Drake Johnson Trust Management Scholarship

### WORK EXPERIENCE

Bladen County District Attorney's Office, Intern Summer 2019. Gained exposure to databases, such as ACIS and CJLeads, by having to routinely search for criminal records. Assisted members of the public with various inquiries, as well as court recalls and traffic dismissals. Worked with Assistant District Attorneys in District and Superior Court. Prepared summaries of allegations against defendants for the Assistant District Attorneys to use in preparing their case. Examined case files and wrote reports on my recommendation for the sentence that I felt that each defendant should receive. Applied effective communication skills when speaking with domestic violence victims over the phone. Organized and prepared 700-1200 files for each traffic court session. Utilized common office equipment (copier, fax machine, Microsoft office, etc)

### EXTRACURRICULAR ACTIVITIES

Phi Kappa Phi National Honors Society, Phi Eta Sigma National Honors Society, Gilbert T Stephenson Trust Club, Small Group Bible Study

**Calvin Hayford**

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## Logan Heintzman

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### EDUCATION

Campbell University, Master of Business Administration, BBA in Trust & Wealth Management. Expected date of graduation: May 2021. Undergraduate Cumulative GPA: 3.134 Presidential scholarship, Becky T. Kelly Trust Management scholarship.

### WORK EXPERIENCE

Comerica Bank, Detroit as well as Ann Arbor, Michigan, June-August 2019. Spent time working alongside Trust Advisors in the back office as well as the front office in Ann Arbor. Worked with Microsoft programs such as Excel, Word and Access to perform a variety of tasks and projects. Also got experience client-facing, bill-paying and contributing to client-calls. Worked in different Trust groups throughout the summer such as Philanthropic, Alliance, Special Needs, PTAA (compliance/audit/new business

review), Investments and Front Office. Campbell University grounds keeping for Houston Astros organization, Buies Creek, North Carolina, February 2017-May 2017. Assisted head of grounds to upkeep and maintain university's baseball field after use by minor league teams, along with maintaining grounds of the university. Arlington Memorial Gardens, Cincinnati, Ohio, May 2017- August 2017 and June 2018- August 2018. Worked to maintain and repair the grounds as well as assist families in burial services. Also worked to upkeep equipment and vehicles and assist those seeking headstones in the gardens.

### EXTRACURRICULAR ACTIVITIES

Campbell University Varsity Division 1 Baseball right-handed pitcher. Campbell University Student Athlete Advisory Committee representative for Campbell University Baseball 2017-2018. Student Athlete junior college transfer mentor for Campbell Baseball.

## Noah Helms

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### 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 2021. Overall GPA 3.211. Presidential Scholarship.

### WORK EXPERIENCE

Marketing Intern at Aramark for Campbell Universities Dining Services from August 2019 to current. Marketing and promoting events dealing with dining services on campus using social media and in person tactics. Assisted in informing and signing up students for meal plans. Informed students about general knowledge on dining locations and the way they operate in coexistence with meal plans. Grill cook at Moe's Southwest Grill in Buies Creek, NC from September 2017 to December 2018.

Ensured the meat was stored in correct environment and cooked to proper temperature. Assisted on the line with customers' orders. Managed the meat and vegetables inventory in store. Private Respite Care in Gastonia, NC from October 2016 to March 2017. Supervised and assisted in the everyday life of a down syndrome client. Coached the client in proper behavior and life skills needed. Organized and followed through with a schedule modified to fit the client's needs. Lifeguard at YMCA of Greater Charlotte from July 2015 to December 2016. Maintained a safe and positive environment. Responsible for opening and closing procedures of the pool. Responsible for the safety of all persons in the pool area by enforcing rules.

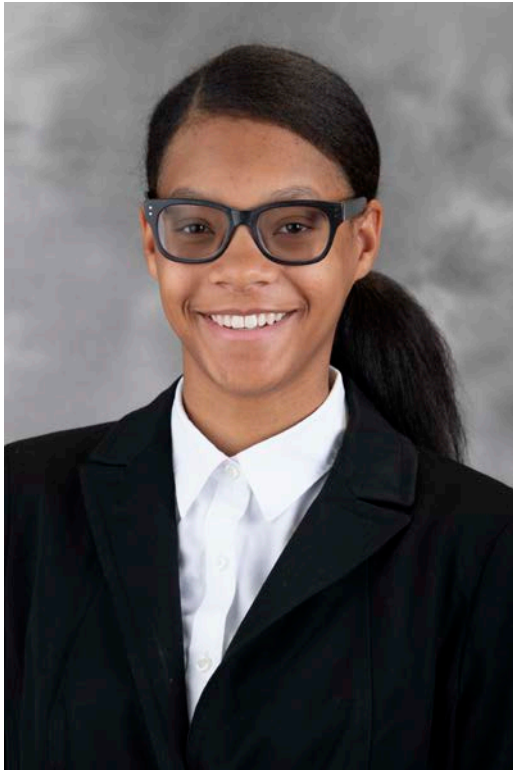
### EXTRACURRICULAR ACTIVITIES

Member of the Finance and Investing club and the Gilbert T. Stephenson Trust club. Investing in the Stock Market. Playing recreational golf and basketball.



## Corrina Hubbard

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### EDUCATION

Campbell University, BBA in Trust & Wealth Management, Minor in Financial Planning. Expected Date of Graduation: May 2021. GPA: 3.644. President's List, Dean's List, Campbell University Presidential Scholarship, Administrative On Campus Housing Scholarship, Out of State Resident Scholarship, Southeastern Trust Management Scholarship, Russ, D.P. & Helen Russ School of Business Scholarship, Robert J Business Scholarship, Dr Ernest Paskel Sauls Business Scholarship, T. Harry Gatton Trust Scholarship.

### WORK EXPERIENCE

Campbell University Residence Life, Community Assistant (Buies Creek, North Carolina), August 2020 - Present. Developed, coordinated, and maintained community in the resident apartments. Distributed information to residents promptly. Assisted residents with any requests or concerns. Campbell University Academic Success Services, Supplemental Instructor (Buies Creek, North Carolina), August 2019 - Present. Attended lectures and recorded notes. Organized material into presentations to assist students. Facilitated weekly summaries of the course. Universal Studios: Cafe 4 (Orlando, Florida), May 2019 - July 2019. Operated and handled the cash register. Maintained a health regulated food environment. Executed effective and genuine customer service. JMRuiz Corp: Bookkeeper Assistant (Sayreville, New Jersey), January 2007 - Present. Organized records of financial affairs. Prepared tax returns for mailing. Handled worked related drop offs and pickups. Childcare (New Jersey), May 2016 - August 2017. Provided reliable transportation from daycare to home. Orchestrated secure living environment. Tended to the child's needs and provided companionship. Landscaping (New Jersey), April 2016 - Present. Renovated lawn and garden appearance. Organized vegetation and solved logistical problems. Provided winter rehabilitation services as needed.

### EXTRACURRICULAR ACTIVITIES

Campus Outreach Servent Student Leader, Campus Activity Board: Community Outreach Chair and Concerts Chair, Relay for Life, BADM 100 mentor, BADM 200 mentor, Life Group Leader, Bible Study Leader, Study Abroad to Costa Rica and Argentina, and Campus Kitchen Project.



## Nathan Jester

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### EDUCATION

Campbell University, Master of Business Administration (Candidate), BBA in Trust and Wealth Management, Minor in Financial Planning. Expected Date of Graduation: May 2021.

### WORK EXPERIENCE

Papa Johns, Driver/Store Associate (Wake Forest, NC), December 2017 - Present. Correctly and efficiently take, process, and deliver customers' orders. Structure merchandise displays in accordance with company standards. Adept in managing stressful situations. Harris Teeter, Customer Service Associate (Wake Forest, NC), June 2015 - June 2018. Strived to give excellent service to ensure repeat business with customers. Distinctly processed customers' orders and collected and facilitated their

payments. Assumed tasks throughout all departments of the store. Performed preparation, in-store, and closing procedures. Buies Creek Fire Department, Volunteer Fire Fighter (Buies Creek, NC), September 2017 - September 2018. Responded to and provided assistance with field and structure fires, car accidents, and other emergency cases. Acquired further professional knowledge and skills through involvement in trainings, workshops, and presentations. Participated in public events as aid in case of emergency. Maintained the station and equipment in its proper condition. CEO of Arielfx Trading and Consulting L.L.C. (Wake Forest, NC), January 2020 - Present. Educate and mentor clients on the foreign exchange market. Provide clients with trade ideas, analysis, and a comprehensive trading course to foster personal growth and development. Effectively process client payment transactions, hold a professional social media presence, and developed and successfully manage the company's L.L.C. title. Truist, Fiduciary Trust Intern (Atlanta, GA), June 2020 - August 2020. Developed a deep understanding in the various wealth management services such as trust, estate, financial planning, brokerage, investments, and private banking. Assisted teammates in merger related policy presentations. Diligently calculated special needs trust distributions. Properly uploaded missing governing client documentation to the Truist software, iWork. Effectively presented on a client's discretionary request to the committee for approval.

## EXTRACURRICULAR ACTIVITIES

Day trader in the Foreign Exchange and commodities markets. Investment Club member. Kappa Alpha Order at Campbell University, Chapter treasurer (December 2018 - December 2019). Muscular Dystrophy Association Fundraiser with Kappa Alpha Order at Campbell University. Intramural basketball and flag football.

## Sarai Jordan

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning & Finance. Expected Date of Graduation: December 2020. GPA: 3.155. Presidential Scholarship, Administrative Scholarship.

### WORK EXPERIENCE

Office of the Comptroller of Currency Assistant National Bank Examiner Financial Intern Co-Op, Roanoke, VA, June 2019- December 2019; Ensured the safety and soundness of nationally chartered banks by monitoring their compliance with applicable laws, rules and regulations. Assessed bank's capital, asset quality, management and supervision, earnings, liquidity, and sensitivity to market risk. Evaluated financial statements and management reports to assign risk-based

ratings for a bank's capital adequacy, liquidity risk, interest rate risk, and earnings. Addressed systemic and operational risk exposure applicable to banks. Learned overall bank performance analysis using ratios from the Uniform Bank Performance Report. Participated in quarterly reports with banks, which included reviewing financial information, loan portfolio performance, and calls with the bank President. Provided written analysis, presented examination conclusions and recommendations to bank management, directors, and senior examiners. Campbell University Resident Assistant, August 2017 - Current; Interacted and connected with residents from a variety of backgrounds to ensure they were adjusting well to new living environments and classes. Consulted students with day-to-day problems such as their studies and personal lives to help them come up with solutions. Organized programs, based on a given programming model, for residents to interact with each other and to be educated. Confronted resident misconduct with appropriate advisory and followed up with said resident afterward in order to help the resident better understand his or her actions. Worked with a staff of fellow Resident Assistants on planning programs, performing duties and interacting with residents. HWY 55 Burgers, Shakes, and Fries Manager, Shallotte, NC, November 2015 - August 2020; Managed staff by orienting, training, assigning, and supervising production. Trained new employees on guest service expectations, safety procedures, proper food handling, and restaurant protocols. Motivated staff through acknowledgment of hard work, achievements and instilling accountability while leading by example. Controlled Profit & Loss by following cash control/security procedures, maintained inventory, managed labor cost, reviewed

financial reports, and acted appropriately to ensure company growth. Answered customer inquiries and resolved issues promptly. Appropriately suggested additional items to guests to increase restaurant sales. Port City Java Shift Lead Barista, Leland, NC, June 2013 - June 2016; Maintained a calm demeanor during periods of high volume to maintain operating standards and to set a positive example for the shift team. Assisted with new employee's training by positively reinforcing successful performance and giving respectful and encouraging coaching as needed. Answered questions about menu selections and made recommendations when requested. Accurately recorded orders and collaborated with team members to serve food and beverages that exceeded guests' expectations. Managed closing duties, including restocking items and reconciliation of the cash drawer.

## EXTRACURRICULAR ACTIVITIES

Campbell University Orientation Leader

## Richard Warren King Jr.

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### EDUCATION

Campbell University, BBA in Trust & Wealth Management, Pre-Law, Minor in Financial Planning. Expected date of graduation: May 2021. Received the Scott-Elis scholarship, CU Administration Award/Legacy award, Hope Scholarship.

### WORK EXPERIENCE

Fayetteville, North Carolina, TR Homes & Designs LLC. Developed and created a custom luxury website based on clients' needs, photographed all new construction, used photographs of new construction to add a foundation to the website, January 2019 - August 2020. Completed the 75-hour North Carolina Real Estate Pre-Licensing course, attended class online in preparation of the Real Estate License Examination on October 29, 2020. Fayetteville, North Carolina, JohnStone Supply, mainly assisting and directing; inventory management, delivery processing and store pick-up orders, June 2018. Organized all inventory efficiently and accurately allowing the orders and deliveries to be processed, checked, and sent out as soon as possible. Delivered large shipments to clients daily, creating customer relations, in hopes that they would choose JohnStone Supply for their next heating and air needs. Fayetteville, North Carolina, Self employed as a landscaper, May 2015 - Present, working day to day under own supervision. Interacted with clients to design a spacious layout for their garden that would result in their dream garden to be designed and executed exceeding their needs. Accounted all necessary expenses for the benefit of the customer, while also trying to maximize profit for my own start-up business. Created custom diagrams according to customers preferences and tastes allowing them to envision what they wish, with some assistance. Developed customer relations and ensured customer satisfaction with results. Cleared out previous landscaping so their new yard may be constructed in a timely manner. Designed client yards: gazebos, gyms, gardens, fountains, fire pits, etc. Fayetteville, North Carolina, King Electric, workman, May 2017, organizing reels of wire, making tools for job sites, and assisting on job sites. Constructed tools for workers to use on the jobsite. Organized inventory for easy access and distribution. Arranged wires into necessary order for underground placement. Insured safety measure to protect employees.

## EXTACURRICULAR ACTIVITIES

Founded the first Coed Club Tennis Team at Campbell. Recruited players for the club, found donors or sponsorships for uniforms and balls, and contacted other universities for availability in tournaments. Helped affected families of hurricane Matthew. Volunteered for the USTA foundation: planning tournament dates, organizing location and players, and mentored young players. Castleman's Disease and Alzheimer's Disease foundations: raised money for the foundations. Organized, promoted, and worked events such as walkathons and bowling.

## William Knabe

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### EDUCATION

Campbell University, BBA in Trust & Wealth Management and Accounting, Minor in Financial Planning. Expected Graduation Date: December 2020. GPA: 3.864. President's List, Dean's List, Presidential Scholarship, Southeastern Trust School, FIS Scholarship Program, Cross Country and Track & Field Scholarship, Phi Eta Sigma National Honor Society, Phi Kappa Phi Member.

### WORK EXPERIENCE

Las Vegas, NV Wells Fargo: Fiduciary Intern, June 2019-August 2019. Provided assistance to the service teams in administration and account activity of clients trust. Task included: Discretionary Request, Gifting, New Account reviews, Client Distributions, and Clearing Daily Overdrafts. Read, interpreted and applied trust document language or state statutes to specific situations for moderately complex accounts.

Identified customer needs and offered informed solutions while managing risk according to terms of the trust document or state statutes. Communicated directly with clients to perform authentication and confirm client requests. Conducted research and prepared necessary materials for client meetings. Utilized software including SEI, Navigator, File Net, CIMM, Client Link, Trust Gateway, and Trust Money Movement. Buies Creek, NC Campbell University Accounting Intern, June 2018-May 2019. Scanned and indexed documents such as invoices, purchase orders, special purpose funds, onto the University's Onbase software. Performed a variety of tasks across the accounting department including Accounts Payable, Accounts Receivable, and Payroll. Garner, NC Target Corporation Cart Attendant/Guest Service, June 2016- August 2018. Covered multiple store areas: cart attendant, cashier, sales floor associate, customer service and food avenue. Processed quick transactions that alleviated wait times. Served as a Target Cart Attendant Team Trainer. Assisted customer's requests with utmost respect and politeness.

### EXTRACURRICULAR ACTIVITIES

Campbell University Student Success Team, Cross Country and Track & Field athlete (2016- 2018), NCACPA SOAR Committee Member, NCACPA/NC State Summer Leadership Conference.



## Matthew Knortz

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, BSA in Economics, Minor in Financial Planning. Expected Date of Graduation: May 2021. GPA 3.55. Presidential Scholarship, Thomas Jack Lynch Scholarship, Administrative on Campus Housing Scholarship, Alumni Referral Scholarship, Southeastern Trust School Trust Scholarship, Hawkins, Benjamin M. Trust, First Citizens Bank Scholarship.

### WORK EXPERIENCE

Haag & Son's Seafood Marketplace Associate, Oak Island, NC, May 2019 - Present. Prepared products for retail and wholesale customers. Assisted new employees with job training. Took and stocked needed inventory for the retail market. B&J Seafood Marketplace Associate, New Bern, NC, January 2015 - May 2019. Greeted and offered selection assistance to customers.

Assisted new employees with job training. Prepared products for customers. Restocked and counted inventory. Provided excellent customer service to all customers.

### EXTRACURRICULAR ACTIVITIES

Fundamental & Technical Analysis of Foreign Exchange Markets, Finance & Investing Club, Gilbert T. Stephenson Trust Club, Intramural Sports.

## Nicolas Lamorte

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### EDUCATION

Campbell University, Master of Business Administration (Candidate), BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2021. Major GPA: 3.56. Campbell University Scott-Ellis Scholarship, Strickland Insurance Group Business Scholarship, Keith, Thomas Joseph & Anne Bell Business Scholarship, and Lundy Fetterman School of Business; David D. Butler Trust Education Scholarship..

### WORK EXPERIENCE

Campbell University (Buies Creek, NC), Graduate Assistant August 2020 - Present I am the Fraternity & Sorority Life Graduate assistant for Campbell. In this role I assist in running the Fraternity and Sorority Life Department on campus. My regular duties including planning events, reserving event spaces and equipment for individual chapters, and running the regular day to day operations of department.

City National Bank (Los Angeles, CA), Trust Department Intern May 2020 - August 2020. In my position with City National Bank I performed a variety of supporting roles which included assisting with systems such as SEI, CSS, IBS, and Salesforce. I completed Admin Reviews and Discretionary Distributions on a regular basis. For Discretionary Distributions I completed everything from the initial request until the final distribution. I also helped with updating any ticklers whenever necessary. Additionally, I assisted in a special project which compiled 3 separate onboarding forms for CNB into a single form to make the onboarding process more efficient.

SunTrust (Atlanta, GA), Fiduciary Risk Management Intern June 2019 - August 2019. My role at SunTrust this past summer was an eye-opening experience and gave me a lot of insight into the world of Trust and Banking. My duties at SunTrust including creating Synoptic Records for accounts by scanning various documents and reading through governing documents to pick out important/useable language. I also completed Regulation 9 reviews for accounts by looking through the documentation uploaded to ensure all the proper documents were uploaded.

Freedom Boat Club (Cornelius NC), Dockhand, May 2017- August 2018. My duties working at Freedom Boat Club included maintaining a fleet of 30+ boats, helping inexperienced boaters dock/operate boats, fuel, and clean/detail. The traits of this job that would apply to the trust field would be the practice of keeping a stressful environment stress free, socializing with members from various backgrounds or cultures, and building relationships with members and their families for a positive experience each time they visited us.

## EXTRACURRICULAR ACTIVITIES

Current President and past Vice-President & Treasurer of the Kappa Sigma Fraternity-Sigma Phi Chapter, Member of the Trust Club, and various Intramural Sports.

## Kevin Laureano

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### EDUCATION

Campbell University, BBA in Trust & Wealth Management Pre-Law, Minor in Financial Planning. Expected date of graduation: May 2021. Cumulative GPA: 3.26

### WORK EXPERIENCE

State Employees Credit Union (Raleigh, NC), Trust Operations Intern, February 2020- July 2020. Converted the entire Trust Department's paper document files into digital versions in order to increase work from home capabilities. Shadowed employees during calls that regarded estate planning and POA's. Assembled folders that contained information on services that the Trust Department provides to members. Captrust Financial Advisors (Raleigh, NC), Wealth Operations Intern, May 2019- August 2019. Assisted in maintaining financial services by tracking and reporting portfolios utilizing

software program Black Diamond for wealth clients. Collaborated with different departments to ensure accurate information is provided to CFP's and their clients. Created training videos for onboarding employees that transferred over through acquisitions. United States Marine Corps (Camp Lejeune, NC), Field Radio Operator, May 2013- May 2017. Deployed and maintained radio communication equipment to send and receive messages. Provided clear and accurate updates of significant events that took place in mission areas to commanding officers. Trained and supervised 15 Marines that were placed under my charge to complete assignments and to perform tasks as ordered. Performed maintenance on radio equipment and troubleshooted equipment as needed in order to maintain 100% mission readiness. Piggly Wiggly (Sanford, NC), Cashier/ Stocker, May 2012- May 2013. Responsible for conducting transactions between customers and the Piggly Wiggly Franchise. Assisted customers in locating merchandise with a great customer service attitude. Restocked shelves when incoming merchandise arrived at the location and kept the shelves maintained by placing relocated merchandise in its proper location.

### EXTRACURRICULAR ACTIVITIES

Volunteered at the Piedmont Animal Refugee on June 2019, volunteered at Hope Reins on July 2019.

## Luka Lazarevic

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### EDUCATION

Campbell University, BBA Major in Trust and Wealth and Minor in Financial Planning, expected to graduate May 2021, Overall GPA 3.395, Major GPA 4.0, Presidential Scholarship, Out of State Resident Scholarship, Southeastern Trust School Trust Management Scholarship, Administrative On Campus Housing Scholarship.

### WORK EXPERIENCE

Houston, Texas, Rice University soccer camp director June - August 2019. Lead group of campers to represent the image of the organization. Created value for the club by developing a collaborative team culture, and served as a role model for younger players focusing on dedication and commitment to their teammates and emphasizing the importance of effective communication as a team player.

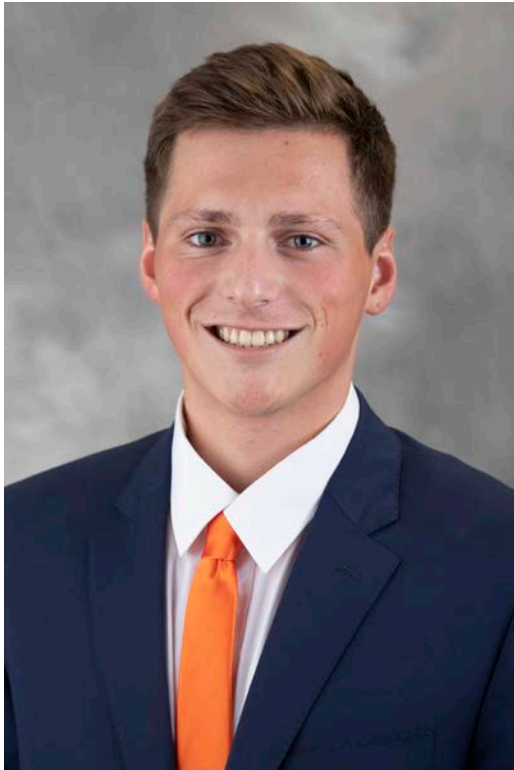
Houston, Texas Houston Medical Imaging Center, smoothed over client onboarding processes by bridging the gap between client wants and insurance needs. Organized and filed documentation for doctors, May 2015- May 2016. Richmond, Texas Foster High School camp director, June 2016, enforced the importance of the soccer camp to attract incoming freshmen to help develop them physically and mentally to capable of playing at the varsity level. Houston, Texas, Cutco - Vector Marketing, Sales Representative, December 2018 - May 2019, Issued presentations in home to customers and provided the education on the cookware that best fit their needs. Filed all sales transaction accurately, strengthened public speaking and team building by assisting each other. I Markets Live, forex/cryptocurrency business, Houston, Texas , June 2019 - Present, enhancing skills such as risk management.

### EXTRACURRICULAR ACTIVITIES

Campbell Men's Soccer Team

## Nathaniel McClintock

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management Minor in Financial Planning. Expected date of graduation is May of 2021. Overall GPA 3.384, Trust Major GPA 3.750; Scott Ellis Scholarship, Out-of-State Resident Scholarship, South Eastern Trust School Trust Management Scholarship. Member of the Phi Eta Sigma National Honor Society.

### WORK EXPERIENCE

Interned at Wells Fargo Bank as a Fiduciary Administrator at Austin, Texas office (June 1<sup>st</sup>, 2020 - August 7<sup>th</sup>, 2020). Learned how to Navigate through SEI to find client information regarding Holdings, beneficiaries, income and principal, and their current assets. Worked with multiple teams from the Austin office who were designated for different parts of the country, working with different types of accounts and

different Trust laws based on the state. Interpreted documents such as: Wills, Trust documents, ACH Distribution forms, Family trees, and Amendments to find the beneficiaries, the distribution provisions, the termination provisions, and the fiduciary powers and fees. Drafted multiple DARs for the teams and clients that would in turn be used to help distribute money from either income or principal to the client from the Trust account. Handled and drafted various forms such as W9's, ACH Distribution forms, FITSA forms and so on, which would be sent to clients for their signature or to the head of the team for approval. Also preformed Annual Account Reviews to ensure everything in the account was correct and that there was sufficient information regarding the beneficiaries, account, and Trust document. Attended 8 PTAC conferences via phone from both the East and West committees to understand how the clients would receive their money from income or principal from the DARs. At the end of the internship all interns worked on Closing of Accounts which entailed in looking into account closing information to find why the account was closing, who will be receiving the income and principal from there on, and to make sure there was not unretrieved money in the account such as checks. Campbell University Campus Recreation Gym Attendant (2017-Present). at the front and back desk at both what was Holding Fitness Center and Carter Gym and now the brand-new Student Union. The main part of the job revolves around organizing weights and athletic equipment as needed while also maintaining the cleanliness of both gyms. Supervising the patrons as they came in and out of the gym with another attendant to ensure the rules of the gym are being upheld and that day-to-day operations run smoothly. Bagger for a



Military Commissary at Grafenwoeher Military Training Post in Grafenwoeher Germany (2014-2017). Assisted with bagging groceries for Military members and their families. Worked with a team of baggers, following a bagger rotation to ensure that all customers are met with fast and ready system that allows the customer to leave upon paying. Constant communication between both Customers and the Cashier. Helping out the customer bring their groceries to their car and loading it up upon request. Secretary at Vilseck American High School in Vilseck Germany (2017-2018). Answered phone calls from parents whom had questions about the school or wanted to pick their child up. Filed paperwork for Scholarships, High School Student Records, and Senior graduation forms. Facilitated mail from the front office to every teacher within the high school. Also, worked as a Mail Clerk at a Military Federal Post Office during the same year (2017-2018). Facilitated mail from Postal boxes into categorized mail slots. After all mail is categorized, had to take the mail that was in specific number categorizes and sort them into their designated mail boxes. Worked the front desk and retrieved large boxes for customers when they brought in their yellow slips. Redirected mail for Soldiers and Spouses who have moved to a new location, providing their new addresses and sorted it so that the mail may be sent to them as soon as possible.

## EXTRACURRICULAR ACTIVITIES

Campbell University Men's Soccer Club Team President and Captain (2017-Present). Men's Co-ed Intermural Soccer.



## William McLemore

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### EDUCATION

Campbell University, BBA in Trust & Wealth Management. Expected date of graduation: May 2021. Awarded the Hope Scholarship, Scott-Ellis Transfer Scholarship, North Carolina Need Based Scholarship, Alumni Referral Scholarship.

### WORK EXPERIENCE

Fayetteville, NC, Hudson Bay Seafood Summer 2014-present. Greet and offer different option to existing and new customers, helps with upfront operations which includes nightly deposits. Participate in daily activities as a team leader. Maintains respect and compassion while dealing with unsatisfied customers. Assist new employees training.

## Andrew Morgan

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### EDUCATION

Campbell University, MAcc (Proposed Candidate), Masters of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2021; GPA: 3.44. Masters GPA: 3.769. President's List, Dean's List, NWCA Academic All-American 2018 & 2019, Southern Conference Academic Honor Roll 2017 - 2019, Men's Wrestling Scholarship, Scott-Ellis Transfer Scholarship, Campbell University Grant, Schilpp, Betty & Alan Scholarship, Byrd, Major Sam Trust Education Scholarship, Stephenson, Grace White & Gilbert Thomas Scholarship.

### WORK EXPERIENCE

City National Bank, Irvine, California, Trust Administrative Intern, May 2019 - August 2019. Assisted team in day to day administration and maintenance of accounts. Supported team

members and colleagues to complete team-based projects. Completed Annual Account Reviews and Account Opening/Closing Checklists. Drafted discretionary distribution requests for clients and ensured they were processed efficiently and effectively. Read and Interpreted Trust documents, creating synoptic overviews to assist colleges in client meetings. Created and updated spreadsheets in order to properly track categorized disbursements and income. Developed a proficiency in programs including SEI Trust 3000, CSS, IBS, and Document Imaging. Assistant wrestling coach and summer camp administrator for Wrestling Prep (Fairfax, VA), June - August 2015-2018. Led wrestling practice sessions for over 60 wrestlers per week, over 5 weeks. Organized day to day schedules for wrestlers and living arrangements for campers. Prepared marketing materials including self-produced interview videos for social media. Coordinated the logistics and led the successful close out of the camp facility and summer residence. Answered and dealt with questions from parents concerning their children's week stay at camp. Worked with the resident staff of the camp's location to ensure we abided all rules that were put in place. MVP Protech, Fountain Valley, CA, 2012-2017, property management and carpenter assistant. Painted a wide range of different objects and houses. Cleaned windows on large scale projects. Performed household yardwork.

## EXTRACURRICULUR ACTIVITIES

Campbell University Varsity Men's Wrestling. Coached Fountain Valley Wrestling Kids Club.

## J. Blake Phillips

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning; anticipated graduation date: May 2021; Overall GPA: 3.928, Major GPA: 4.0; President's List (four semesters), Dean's List (two semesters); Phi Eta Sigma National Honor Society; Scott-Ellis Academic Merit Scholarship, Harry C. Carter Endowed Scholarship, First Citizens Bank Scholarship, Kenansville Lions Club Scholarship, Campbell University Residence Life Scholarship, Dr. Ernest Paskel Sauls Business Scholarship, Southeastern Trust School - Trust Management Scholarship, Admissions Ambassador Scholarship, Dorthey and Joseph Barber Business Scholarship, and the Newkirk Family Trust Management Scholarship

### WORK EXPERIENCE

Wells Fargo, Real Estate Asset Management Intern (San Francisco, CA; Virtual) June 2020-August 2020. Conducted internal audit of trust acceptance documents and reconciled errors in their national file sharing database. Reviewed and summarized 43 trust documents of new accounts. Navigated through several county tax collector websites to ensure that all tax bills had been updated as paid. Assisted in the processing of monthly residential and commercial property management statements. Phillips & Phillips, Attorneys at Law, Summer Employee (Kenansville, NC) 2015-2019, duties consist of filing documents at the Clerk of Superior Court and Register of Deeds, attending trials, drafting legal documents specific to each client's case, scheduling appointments, receiving and returning emails, phone calls, and mail on behalf of the firm, collaborate with the Duplin County Tax Administration, organizing files, and client intake; Campbell University Office of Admissions, Admissions Ambassador (Buies Creek, NC) April 2019-Present, this role requires me to assist team members with daily tasks including answering phones, filing paperwork, organizing the office, and facilitating tours in both one-on-one and group settings; Campbell University Lundy-Fetterman School of Business (LFSB) Student Mentor (Buies Creek, NC) 2018-Present, work in conjunction with the Dean and Student Success Coordinator in an effort to assist first year students in adapting to college life, provide academic support and course related advice to students while they work through a semester-long project, provide feedback for all submitted work.

## EXTRACURRICULAR ACTIVITIES

Eagle Scout, Student Government Association (SGA) Executive Board Member serving as Student Body Vice President, Executive Treasurer; SGA Finance Committee Chair, SGA Parliamentarian, SGA Freshman Class Vice President, SGA Vice Chairman for the Advancement Committee SGA Representative on the Campbell University Multicultural Diversity Committee, Campbell University Summer Orientation Leader, Campbell University Mock Trial, Ignite Campus Ministry Group Member, Campbell University Small Group Bible Study Member, Ziglar Youth Certified Trainer, Camel Chapter of Ducks Unlimited Banquet Chairman, LFSB Admissions Team, Campus Activities Board (CAB) Off-Campus Committee Member, CAB Spring Fling and Homecoming Committee Member, CAB Arts and Culture Committee Member.

## Danielle Randolph

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning, Expected date of graduation: May of 2021. Overall GPA: 3.565 Campbell University Presidential Scholarship, Top 10 Percent Award, Dean's List, President's List, Becky T. Kelly Trust Management Scholarship, Thomas Jack Lynch Scholarship, Southeastern Trust School Trust Management Scholarship

### WORK EXPERIENCE

Target, General Merchandise/Fulfillment Expert (April 2020 - Current) Assisting guests with questions or concerns. Stocking inventory. Setting plan-o-grams. Accurately placing and back-stocking merchandise. Training new employees. Picking and packing merchandise. Under Armour, Sales Associate (February 2019 - Current) Greeting and assisting customers with

questions or concerns they may have regarding the product or brand. Folding/hanging merchandise. Returning and restocking merchandise. Maintaining a clean work environment. Assisting customers at the cash wrap. Achieving goals set by Under Armour. Aramark, Peer to Peer Marketing (January 2019 - Current) Selling meal plans to students. Providing information to students regarding the meal plans. Promoting commuter meal plan that included a free punch card. Contributing to the marketing plan. Squeegee Pros Inc, Office Assistant/Debt Collector (July 2015 - August 2019) Completed administrative duties including filing work orders, billing clients, tracking routes and inputting payments received while using Smart Service and QuickBooks. Collecting past due invoices. Completing payroll. Attended office meetings. Created email blasts. Reconciling the bank. Preparing a schedule for employees. Organizing documents and maintaining a clean work environment. Moe's Southwest Grill, Food Handler (September 2017 - March 2018) Supervisor (March 2018 - January 2019) Handled and distributed money. Overseeing six food handlers each shift. Executed company policies and procedures. Created and maintained a friendly work environment. Provided training for new employees. Reconciled cash registers at the end of the night. Handled customer complaints. Assisted customers with questions. Reported issues to the Assistant and General Manager. Certified in SERV Safe Management.

# EXTRACURRICULAR ACTIVITIES

Gilbert T. Stephenson Trust Club



## Zach Roderick

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### EDUCATION

Campbell University, Masters of Business Administration (proposed applicant), BBA in Trust & Wealth Management. Expected Date of Graduation: December 2020. Overall GPA: 2.894. Dean's List. Scott-Ellis Scholarship, Campbell University Football Scholarship.

### WORK EXPERIENCE

Sports-camp counselor for two years, coached kids from ages 9-12 how to play numerous sports; football, lacrosse, basketball, wrestling. (2014-2016) Worked with construction crews for the past two years putting together airplane hangars and gym layouts in local Virginia areas. Also helped with home improvement and installation of Caroline County High School's basketball gym. (2014-2016). Caregiver for a family's son, who has disabilities, under a company named Public Partnerships. A part of the Leadership Committee

on Campbell University's Football Program, Starter all three years.

### EXTRACURRICULAR ACTIVITIES

Member of the Campbell University football team. Kids-point counselor for LifePoint Church in Fredericksburg, Va. Help with specials needs events, including Woodberry Forest's annual Special Olympics. A caregiver for a family's son, which is very important to how I look at life, with the intentions to treat everyone with respect and equally. Attend FCA and ransom events within the school community.

## Tucker Smith

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2021. Major GPA: 3.4, Overall GPA: 3.3. Scott-Ellis Scholarship.

### WORK EXPERIENCE

The Grout Doctor, Grout Technician (Angier, NC), October 2017-February 2018. Collected and organized all materials and equipment prior to heading to each job site. Interacted with customers to perform estimates and answer questions. Assisted supervisor with re-grouting, re-caulking, grout cleaning, sealing, and recoloring. Lasater Printing & Embroidery, Production Associate (Angier, NC), May 2016-January 2018. Organized and took account of products prior to delivery or customer pick-up. Maintained and operated equipment to produce

customized apparel for customers.

### EXTRACURRICULAR ACTIVITIES

Volunteer at Angier Food Pantry. Intramural Sports.

## Gerrit van Schalkwyk

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2021; GPA: 3.503, Dean's List, Scott-Ellis Scholarship, Dr. Ernest Paskel Sauls Business Scholarship, Lundy Fetterman SOB Fellows Scholarship, Willis & Marguerite Gupton Scholarship.

### WORK EXPERIENCE

Gentlewoods Food LLC. (Apex, North Carolina), Personal Assistant to CEO, Warehouse Manager, Assistant Sales Representative. May-August 2014-2019. Supported CEO with warehouse logistics and planning ensuring product accessibility for orders. Managed warehouse supply of all products and requested additional merchandise when necessary. Performed inventory review of 48 stores on a 6-week cycle and recommended order placements for

inventory required. Processed all invoices and payments for orders using QuickBooks and deposited payments at the company bank. Rise Against Hunger (Raleigh, North Carolina) Warehouse Intern. June 2016. Assisted in organizing warehouse and materials used in food packing events. Assisted in loading containers being prepped for shipping to starving regions across the world.

### EXTRACURRICULAR ACTIVITIES

BB&T Business Fellows Program Member, Vice President of Recruitment of Campbell Fraternal Council, Member and Vice President of Zeta Psi chapter of Kappa Alpha Order Fraternity, and Campbell University Investment Club Member

## Alanna Swett

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2021, Major GPA 3.62. Presidential Academic Scholarship recipient.

### WORK EXPERIENCE

North Carolina State Employees' Credit Union, Summer Intern, Raleigh, NC, May - July 2020. Review trust documents and compose synoptic records to ensure accurate recordkeeping. Train to communicate with Trust Officers and Trust Representatives within the branches. Observe estate planning communications with clients. Rose and Johnson PC, Summer Intern, Columbia, North Carolina, June-August 2019. Communicate with clients to discuss case information. Manage sensitive information while

maintaining client confidentiality. Ensure all case documents have been properly scanned and filed in a timely manner. Campbell University, Success Coach August 2018-Present. Advise students on proper usage of technology to advance their career at the University. Instruct students on resources offered through the University. Ensure students have proper study habits and time management skills. Campbell University, Peer Mentor- Academic Recovery Seminar, January 2019-May 2019. Assist instructor with course content and creating assignments. Ensure students are performing proficiently on given assignments. Old Salt Oyster Bar, Hostess (Columbia, North Carolina), February 2015- October 2016. Resolved complaints in a friendly and efficient manner. Greeted customers and maintained a running record of reservations to ensure efficient seating. Provided excellent customer service to all patrons to maximize their dining experience. North Carolina House of Representatives, House Page (Raleigh, North Carolina), Summer 2014. Supported North Carolina Representatives in daily operations and attended daily Session. Provided administrative assistance to Representative Paul Tine.

### EXTRACURRICULAR ACTIVITIES

Campus Outreach Servant Leader, Toys for Tots Volunteer, Tyrrell County Animal Shelter Volunteer, Red Cross Volunteer.

## Campbell Tarpey

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### EDUCATION

Campbell University, Master in Business Administration Candidate, BBA in Trust and Wealth Pre-Law, Minor in Financial Planning: Expected Date of graduation: May 2021; Overall GPA 3.8. President's List, Dean's List, Presidential Scholarship, Residents Life (RA) Scholarship, Dr. Ernest Paskel Sauls Business Scholarship, Carl G & Nancy Ward Scholarship, Edith C and Raymond L Jr. Mulkey Scholarship, Alumni Referral Scholarship, Trust Management Alumni Scholarship, Phi Eta Sigma National Honors Society.

### WORK EXPERIENCE

Campbell University Southeastern Trust School, Student Assistant (Buies Creek, North Carolina) June 2018 - June 2018. Collaborated and assisted the 80 Trust officers from across the country throughout the entirety of the week long

program. Capitalized on the opportunity to listen to successful speakers from the trust field and network with multiple professionals across the industry. Engaged in productive conversations and lectures about Trusts in the modern world while preparing the other trust officers for an exam. Campbell University Residence Life, Residence Assistance (Buies Creek, North Carolina) August 2017-May 2018. Create and facilitate a "My door is always open" policy that assists in the productivity of any level of management. Supervise the residence hall, responding to all requests and emergencies during duty hours. Receive and promptly process requests for maintenance repairs and custodial needs received from residents. Organize and implement programs for residents that enhance the social, educational, community, and personal development of residents. Campbell University Lundy Fetterman School of Business (LFSB), Student Mentor (Buies Creek, North Carolina) August 2017-Present. Acted as the liaison between the students, dean, success coordinator, and the teaching assistant. Mentored the freshman in making social, business, and personal connections in attempt to facilitate networking skills. Assist incoming freshman overcome the roadblocks that come with the college transition. Guide the freshman's construction of their own detailed food truck business plan, figures sheet, and presentation. Walgreens, Customer Sales Associate (Apex, North Carolina) February 2016-Present. Contributed to the sales team by marketing products, markdowns, and sales to the appropriate clients. Initiated the Walgreens' Customer Sales Associate protocol by greeting each valued customer with respect. Conducted weekly inventory checks, re-ordering, and communicating with upper level management through inventory

systems such as AS400 and Excel. Engaging and assisting in operation of the store at the beginning and the end of the day by operating under Walgreens' protocol.

## EXTRACURRICULAR ACTIVITIES

Campbell University Student Athletic Advisor Committee (SAAC), Campbell Presidential Scholars Club, Campbell University Phi Eta Sigma National Honors Society, Campbell University Football Team, Lundy Fetterman School of Business (LSFB) Mentor.



## William Yates

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning, with a specialization in Pre-Law. Expected date of graduation: May of 2021. Overall GPA 3.33; Scott-Ellis Scholarship, Administrative on Campus Housing Scholarship, South Eastern Trust School Trust Management Scholarship, Thomas H. and Judith O. Folwell Trust Management Scholarship.

### WORK EXPERIENCE

Volunteer advocate with the North Carolina Guardian ad Litem Program, November 2018-Present. Volunteer advocates are responsible for advocating the needs of abused and neglected children in the court system. Responsibilities include monthly visits with a child-client, monthly reports to a court employed supervisor, and court reports presented to the judge presiding over the case. Volunteers are appointed by a judge and are required to be present for court dates to give testimony when necessary. Assistant District Attorney Intern, with Prosecutorial District 23, May 2019 - June 2019. Worked directly with the assistant district attorneys in preparing cases for plea or trial. Discussed law, district policy and networked with local attorneys, as well as district and superior court judges. North Carolina State Treasurer Legal Intern June 2020- August 2020. Worked directly with the General Counsel observing investment and finance from an institutional perspective while gaining insight on legal issues and solutions revolving from them.

### EXTRACURRICULAR ACTIVITIES

Former Delegation Chairmen and current Council of State Treasurer of the North Carolina Student Legislature Campbell Delegation. Student Government Association Senior Class Representative. Ducks Unlimited Camel Chapter Member. Eagle Scout, 2014.

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