



CAMPBELL
UNIVERSITY

Lundy-Fetterman
School of Business

Trust & Wealth Management

2021 - 2022
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.

Adam Ardis
Zach Barnes
Melea Butler
Micaela Casapullla
Cameron Colella
Hayes Chamblee
Tyler Dail
W. Camden Dascombe
Brady Frampton
Taylor Gunter
Dwight Hendricks
Rachel Jones
Austin Knapp
Dakota Leonard
Steven Mangus
Jeffrey Moore

Kasey Norris
Christian Oliver
Travis Peacock
William B Phenicie
Gerald H. Quinn III
Savanna Rocco
Aaron Schnoor
David Aaron Smith
Lowell Taylor
Landon Tate
Thomas Webster
Nolan Wiggs
Garret Wilson
Sedeq Younger

Adam Ardis



EDUCATION

Campbell University, Master of Business Administration with BBA in Trust and Wealth Management, Minor in Financial Planning. Expected graduation: May 2022. Overall GPA: 3.285 Received multiple scholarships including: Presidential Scholarship (\$17,000); North Carolina Need Based Scholarship (\$7,300); Southeastern Trust School Trust Management Scholarship (\$500); First Citizens Bank Scholarship (\$7,500); 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 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, Master of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning; 3.308 Cumulative GPA, Scott Ellis Scholarship, Out of State Resident Scholarship, as well as 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-Present, 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.

Melea Butler



EDUCATION

Campbell University, B.B.A. in Trust & Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2022. GPA: 3.851. President's List, Dean's List, Presidential Scholarship, Administrative On Campus Housing Scholarship, The Major Sam Byrd Trust Education Scholarship, The G. Fred Hale Memorial Business Scholarship; The Wells Fargo Trust and Wealth Management Scholarship.

WORK EXPERIENCE

Campbell University Residence Life, Community Assistant (Buies Creek, NC) August 2019 – May 2021. 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 worked 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 (Buies Creek, NC) August 2019 – Present. Duties consist of co-teaching a CUFS seminar class for incoming students once a week. Meet with a paired faculty member once a week to plan the class based on assigned topics and prepare corresponding activities. Share skills and tips about what it means to be in college and how to be a successful student. Schedule an individual meeting with each mentee to ensure they are experiencing a smooth transition into college and help them learn to adjust. Taylor Hoffman, Wealth Management Intern (Richmond, VA) May 2021 – August 2021. Gained valuable knowledge concerning wealth management and investments. Worked with financial planners to learn about inputting client data to create a financial plan. Completed extensive account reviews to assess the financial and investment position of clients. Contributed to the company's Learning Center page on their website by writing blogs on various topics related to finance. Attended meetings revolved around the launch of the company's new fintech app, known as Avidus. Listened to client calls to understand how to have responsible interactions with them. Participated in several leadership sessions, both individually and collectively, for the purpose of personal growth and enhancing the company's culture of team work.

EXTRACURRICULAR ACTIVITIES

Campbell University Student Government Association (CUSGA), Sophomore Secretary and Treasurer (CUSGA), Student Affairs Committee (CUSGA), Junior Secretary (CUSGA), Public Relations Committee (CUSGA), Executive Secretary (CUSGA), Chair of Public Relations Committee (CUSGA). Phi Eta Sigma National Honor Society, member; The Honor Society of Phi Kappa Phi, member; Omicron Delta Kappa - The National Leadership Honor Society, member. Piano Lessons.

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: 3.52. Campbell University Presidential Scholarship, Out of State Resident Scholarship, L. Stuart Surles Business Scholarship, Fred & Pearle K. McCall Scholarship, First Citizens Bank Scholarship, Southeastern Trust School Trust Management Scholarship, Dr. Ernest P. Sauls Business Scholarship

WORK EXPERIENCE

Waitress at Aviator Smokehouse in Fuquay-Varina, NC (September 2020- Present) Greet diners with interpersonal communication to make them feel welcomed. Offer recommendations on beer pairings and suggestions. Answer questions and concerns about menu items. Utilize the cash register correctly for customers' credit card or cash bills. Provide accurate and timely service to all patrons. Wealth Management

Intern at Taylor Hoffman in Richmond, VA (May 2021-August 2021) Researched and wrote blogs about financial subjects of interest to be published. Reviewed client accounts to ensure information was up to date. Met with financial advisors to discuss how to input client information for a financial plan. Listened to client calls to learn how to interact with them. Became familiar with company computer programs 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 senior upper management. Rotated through company departments learning about different areas of trust administration. Completed a project to create a mock estate plan based on a family's needs. Reviewed and interpreted trust documents. Participated in a virtual volunteering opportunity. 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.

EXTRACURRICULAR ACTIVITIES

Member of Campbell University Delta Phi Epsilon Sorority (2019-Present), Mentor for Freshman in New Student Forum (2019-2020), Member of Campbell University Club Ultimate Frisbee Team (2018-2020)

Cameron Colella



EDUCATION

Campbell University; Master of Business Administration Candidate, BBA Trust and Wealth Management, Minor in Financial Planning; Expected graduation: May 2022; GPA: 3.881; Major GPA: 4.0; MBA GPA: 4.0; Presidential Scholarship, Out of State Resident Scholarship, Major Sam Byrd Trust Education Scholarship, First Citizens Bank Scholarship, Southeastern Trust School Scholarship, Edith Mulkey & Raymond Jr. Scholarship

WORK EXPERIENCE

Trust and Estates Intern at City National Bank (Delaware) in Wilmington, Delaware, Summer 2021: Analyzed trust language in order to assist Trust Officers with clarification of listed dispositive provisions. Uploaded and indexed various trust documents in compliance with fiduciary and bank regulations. Assisted team in day-to-day administration and maintenance of accounts and supported team members and colleagues to complete team-based projects.

Worked closely with the Estate Settlement team to ensure account closings and notice letters were correctly mailed out to beneficiaries. Completed asset transfers and distributions in order to satisfy beneficiary and account needs. Fine-tuned proficiency in programs including SEI Trust 3,000, CSS, IBS, Synergy, Cognivision (Doc Imaging) 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 attended 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. Healthy Tea “Bar-Tender” at TooGoodToBeHealthy in Buies Creek, North Carolina, August 2021 – Current: Responsibilities include making teas and shakes for customers while maintaining a calm, positive, and exciting persona. Must clean, sanitize, and maintain working and lounge areas. Restock supplies, count cash in the register, go through opening and closing checklists, and assure all supplies are necessary for next shift. 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, Vice President, Grand Procurator, 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, Brazilian Jiu-Jitsu.

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 capitol 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.

Tyler Dail



EDUCATION

Campbell University, Bachelor of Business Administration, Trust and Wealth Management major. Expected date of graduation: May 2022. Overall GPA: 3.764; Major GPA: 3.764; Campbell University Presidential Scholarship; First Citizens Bank Scholarship; Rowland, Gordon B. Trust Scholarship; Thomas, Mildred Davis and Edgar Augusta Scholarship; Wiggins, Norman Adrian & Mildred Harmon 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. Truist Financial Internship,

June 2021-August 2021. Trust Administration Intern. Complete annual account reviews for Trust and IRA accounts. Feed documentation to the bot program to create account synopses. Developed a greater understanding of trust documentation and file organization while navigating several different company intranet sites.

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, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected graduation date: May 2022. Major GPA: 3.875, MBA GPA: 4.0, Cumulative GPA: 3.462. President's List, Dean's List. Campbell University Scott-Ellis Scholarship, Marvin D. Johnson Trust Management Scholarship, John Hill Trust and Wealth Management Scholarship, Sue Worthington and Garland Wayne Tuton Scholarship, Jimmy E. Witherspoon Trust Scholarship. The Truist Leadership Institute – Emerging Leaders Certification.

WORK EXPERIENCE

Taylor Hoffman, Wealth Management Intern (Richmond, VA) May 2021-August 2021. Assisted in the creation of in-depth financial plans for various prospects and clients, detailing cash flow and retirement planning techniques. Aided investment advisors in the rebalancing and trading of accounts in order to achieve targeted portfolio diversification. Researched, created, and reviewed financial education content for firm's website. Reviewed client accounts to determine any outstanding issues such as improper account balancing, incorrect beneficiary designations, and noteworthy upcoming RMD's. Exposed to in-depth wealth management, financial planning, and investment management strategies through frequent discussion with colleagues. Developed a proficiency in Charles Schwab Advisor Center, Black Diamond Wealth Platform, and RightCapital financial planning software. Truist Financial Corporation, Fiduciary Trust Intern (Online, Remote) June 2020-August 2020. Developed a strong fiduciary foundation aiding in the administration of irrevocable trusts, revocable trusts, and investment management accounts, with Advisory Center Team. Provided ongoing support to Trust Advisors through clearing of various Reg. 9 exceptions. Analyzed, prepared, and presented discretionary requests from beneficiaries to discretionary committee for approval. Gained exposure to all facets of private wealth management through recurrent discussions 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 management and leadership experience through delegation of tasks to team members. Trusted with additional responsibilities and cash handling of store. Performed managerial duties such as store opening and closing. Omega Sports, Sales Associate (Morrisville, NC) July 2015-June 2019. Acquired valuable customer service skills through participation in many local events. Dutiful, knowledgeable sales associate for 3+ years prior to promotion. Gained useful marketing skills through restocking of shelves and store presentation.

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.

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, Truist Business Fellow, Overall GPA: 3.829, MBA GPA: 4.000, President's List, Dean's List.

WORK EXPERIENCE

Campbell University (Buies Creek, NC), Resident Director, July 2020-Present, Responded to duty situations for all 1400 on campus students. This included: drugs and alcohol, fire, flooding, suicidal ideation, sexual assault, conflict mediation and lockouts. Executed office hours in the residence life office, building hours for Bob Barker Hall and all tasks as assigned by the office of residence life and housing. Leadership of five community assistants including: staff meetings, one on ones, performance reviews and requirement communications. Campbell University (Buies Creek, NC), Graduate Assistant for Global

Engagement, August 2021-Present, Collaborated with faculty members to prepare for study abroad programs throughout multiple countries in Europe. Budgeted travel expenses with excel and finalized costs to be charged to students by the university. Created marketing material for programs using Canva and Adobe. American Armed Forces Mutual Aid Association (Virtual), Investment Assistant. June 2021-July 2021. Process and report creation for audit compliance with the North Carolina Commissioner Of Banks. Generated Morningstar model portfolio reports to assist relationship managers in their support of our members. 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 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. 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

Elon Innovation Challenge winner, Teaching Assistant for BADM100 seminar class, Inaugural Truist Business Fellow, Member of the safety council for the Lundy-Fetterman School of Business, pitcher for club baseball team, single digit handicap golfer.

Taylor Gunter



EDUCATION

Campbell University, BBA in Trust & Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2022. Overall GPA: 3.517. Dean's List, Presidential 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, Federated Investors Incorporated Trust Scholarship.

WORK EXPERIENCE

First Citizens Bank Corporate Wealth Intern, June 2021 - August 2021. Worked on the Institutional Trust team. Attended meetings on the sales and service side of the department with topics ranging from managerial calls between various institutional offices to account openings on the sales team. Performed prospecting for the sales team by scrubbing different lines of data to identify potential new charitable/not for-profit clients through a vlookup process on Microsoft Excel. Updated an internal database for proposals by communicating with various departmental members. Attended account acceptance and discretionary review meetings in the Personal Trust department. Worked alongside six other interns from various wealth management teams on a final presentation to present to senior wealth leaders. 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.

EXTRACURRICULAR ACTIVITIES

Director of finance for Delta Phi Epsilon Sorority (fall 2019), Delta Phi Epsilon Vice President of Membership Development (November 2020 - November 2021), Schwinn Indoor Cycling Certification, group fitness instructor, intramural sports.

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: 3.175. Received the Scott-Ellis Transfer Scholarship (11000) and Mary Paschal Trust Scholarship (2000).

WORK EXPERIENCE

Truist, Wealth Fiduciary Intern (Risk and Compliance), Atlanta, Georgia (Remote) June 2021 – August 2021, Reviewed 700+ Revocable trust accounts for adherence to Regulation 9 requirements, Reviewed 300+ government documents for adherence to Regulation 9 requirements, Reviewed 200+ Transaction documents to verify the accounts balances, Reviewed 200+ Investment policies for adherence to Regulation 9 requirements , Consolidated over 300+ documents for overall account Synoptic records. 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

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, Held, Mabel Fetterman School of Business ES scholarship, Rowland Gordon B Trust Scholarship, and Maloney Eugene Trust/With Bus Scholarship. Awarded the Emerging Leader Certification from the Truist Internship Program

WORK EXPERIENCE

Campbell University Academic Advising, Receptionist, (Buies Creek, NC) August 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, make appointments for students who need future help. Truist Financial Corporation, Wealth Fiduciary Intern, (Virtual) June 2021-August 2021. Duties included performing account reviews, IPS reviews, W-9 and governing document reviews, located and sent documents to the BOT to create synoptic records for irrevocable accounts. Developed a proficiency in SPV, SEI, IWork and others. 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 working front desk performing tasks such as check-in, answering patient questions in person and over the phone, scheduling appointments, helping with preparing paperwork, moving faxes into appropriate patients medical records. 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 of upgrading the appointment clients were there for, sell memberships and products available in store, 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: 3.94. Presidential Scholarship, President's List, Dean's List, BB&T Business Fellow.

WORK EXPERIENCE

Truist Financial Corporations, Estate Services Intern (Atlanta, GA, Remote), June 2021-August 2021. Responsibilities focused on performing non-monetary discretionary review processes and presentations to the working group for account declinations for estate accounts that did not meet bank approval criteria. Created in-depth guides for the New Account Opening and compliance regulation 9 systems exception clearing processes. Contacted Insurance companies on behalf of decedents for filing forms and submitting claims for various insurance policies. Paid bills and corrected digital coding for Interim and Estate accounts for Estate

Advisors. Finwell Benefits, Financial Wellness Intern (Remote), January 2021-May 2021. Acquired financial planning operations training under Riskalyze software systems. Managed the team's customer service email account for team calls, tasks, and assignments. Created drafts of monthly financial planning newsletters for review to subscribed members. Curated PowerPoint decks for client calls, presentations, and specialty workshops. Engaged in weekly meetings covering market research, financial planning, and team building Truist Financial Corporation, Fiduciary Trust Intern (Atlanta, GA, Remote), June 2020-August 2020. Performed 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 client's 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.

EXTRACURRICULAR ACTIVITIES

BB&T Business Fellows Student Mentor, 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: 3.677. Awarded multiple scholarships, including Presidential Scholarship; Administrative on Campus Housing Scholarship.

WORK EXPERIENCE

Osha Thai Kitchen & Sushi (Holly Springs, NC) Server, July 2021 – 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. Hickory Tavern (Holly Springs, NC), Server, December 2020 – July 2021. 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. Abbey Road Tavern & Grill (Fuquay-Varina, NC), Server, December 2018 – December 2020. 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. 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. 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.

EXTRACURRICULAR ACTIVITIES

Phi Delta Theta Fraternity; Member, Campbell University Trust Club; Member, Campbell University Marketing Club; Member.

Steven Mangus



EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning. Expected graduation date: May 2022. Current GPA: 3.61, Deans list, Recipient of Scott-Ellis Scholarship, Sauls Dr Ernest Paskel Business Scholarship, Gatton T Harry Trust Scholarship, Miller, Janice Daniels & Clifford Russel Scholarship, Band Performance Scholarship.

WORK EXPERIENCE

Truist Fiduciary Intern (Remote) June 2021-August 2021. Developed an understanding of Trust documentation and trust administration through reviewing trust accounts and ensuring all documentation was present and proper. Aided other departments with organization of trust accounts and recorded documentation to assist in the Truist merger. Assisted with organization of account numbers for future bank references using bot technology. 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

Jeffrey P. Moore



EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-law, Minor in Financial Planning. Expected date of graduation: May 2022. Campbell University Scott-Ellis Scholarship and Peggy R. Lawrence Endowed Trust Scholarship Recipient. Law School Proposed Applicant. Currently enrolled in the Pitt Community Paralegal Studies Program. Pitt Community College, Associate in Arts and Associate in Science. Graduated May 2020.

WORK EXPERIENCE

Certified Pharmacy Technician (CPhT) at Harris Teeter Pharmacy; September 2020-Current. Assisted the pharmacist in the preparation and distribution of medications, documenting prescriptions, maintaining drug inventories, patient records, and pharmacy records in a manner consistent with all federal, state, and local laws and regulations as well as pharmacy policies and procedures. Prepared credit memos and invoices. Adjudicated various insurance claims. Interacted with doctors and customers on a regular basis. Legal Assistant and Summer Associate for Stokes & Lambert L.L.P.; May-August 2021. Gained experience in Criminal & Civil Procedure. Gathered case information, prepared court documents, drafted motions, assisted trial efforts, engaged with clients, stayed in constant communication with Judges and the District Attorney's Office, filed documents with the Clerk of Court, and assisted with office administration. RNC Turf Coordinator; March-November 2020. Recruited prospective Team Leaders, 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 and lead Leadership Initiative Training on volunteer recruitment, voter registration, meet-ups, digital activism, voter contact, coalitions, and data utilization. Observed ballot tabulation of the 2020 Election ensuring State Board of Election standards were met in accordance with N.C.G.S. § 163.

EXTRACURRICULAR ACTIVITIES

Brother of the Sigma-Phi Chapter of Kappa Sigma Fraternity at Campbell University. SGA Senior Class Representative. Member of Campbell University Mock Trial. Member of Campbell University Criminal Justice Club.

Kasey Norris



EDUCATION

Campbell University, 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, McNeil Chestnut Trust and Wealth Management Scholarship, Gordan B. Rowland Trust 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.

Store manager for Mimi' Boutique and Fine Gifts in Goldsboro, NC (May 2018- May 2020). 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. Wealth Management Intern at Taylor Hoffman (Richmond, Virginia) May- August 2021. Upheld our fiduciary responsibility by actively monitoring our cash positions and reinvesting or rebalancing with the team. Performed comprehensive account reviews to remediate potential risks and to identify potential sales opportunities across the other lines of business. Published blog material for the learning center and the newly released financial technology application Avidus. Assisted with the creation of a financial plan for potential clients specifically notating the importance of retirement planning. Executed case study focusing on the understanding of estate planning as a team, which is a core tenant of Taylor Hoffman's Capital Management approach. Enhanced client experience by attending interior design meetings for the new launch of the office aesthetics. Collaborated with various team members on special projects to increase efficiencies and better understand the operations of the company.

EXTRACURRICULAR ACTIVITIES

Member of Campbell University Alpha Delta Pi Sorority, Vice President of Finance for Alpha Delta Pi. Senior Class Representative For Student Government Association, as well as serves as Academic Affairs Committee Chair. Member of Campbell University Female Associated with Business Club. Volunteer at the Ronald McDonald House in Durham, NC.

Christin Oliver



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of Graduation: May 2022. Major GPA: 3.750, Awarded the Presidential Scholarship, Top Ten Percent Award, First Citizens Bank Scholarship, Lewis, Thomas Murray & Shirley Rice Scholarship, Honors: Dean's List

WORK EXPERIENCE

Truist Financial Corporation, Wealth Fiduciary Intern, Online – Remote (June 2021-August 2021). Performed account reviews, located and sent documents to Truist BOT to create synoptic records for irrevocable accounts, performed IPS reviews, performed governing document reviews, W-9 form reviews, developed a proficiency in SEI, iWork, SPV and others. Secretary at Oliver's Oil Company/ Sun-Do Kwik Shop, Lumberton, NC (2020-2021), assisted in account receivable and payable

department for 125 dealer sites by completing freight invoices and bill of ladings, completed customer account balance charges between 17 Sun-Do Kwik Shops and Oliver Oil, distributed account summary statements to clients, completed sales transaction reporting for 17 Sun-Do stores, assisted as a clerk for Oliver's Oil Company during the Colonial Pipeline shutdown.

EXTRACURRICULAR ACTIVITIES

Active member of Campbell University's Alpha Delta Pi Sorority (2018-Present), Alpha Delta Pi Digital Media Specialist (2021), Member of Alpha Delta Pi Sunshine Committee (2019), Collected tabs and visited Ronald McDonald House with the sorority. Lundy Fetterman School of Business Stock market simulation and Student Investment Fund Division II competition winner (2021) Contributed to the simulation fund by researching stocks and selecting stock picks. My team had a combined portfolio value of \$563,625 which placed us on the leaderboard. 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).

Travis Peacock



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning, Expected Graduation Date: May 2022; Cumulative GPA: 3.837. Academic honors: President's List, Dean's List, Presidential Scholarship, Top 10 Percent Award, FFA Scholarship, Thomas Joseph and Anne Bell Keith Business Scholarship, Kazam and Talat Mostashari Business Scholarship, Lewis M. and Annabelle L. Fetterman Business Scholarship, and T. Harry Gatton Trust 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, operating the fryer, 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, care for, harvest, and sell a variety of crops.

EXTRACURRICULAR ACTIVITIES

Coin collecting, fishing, intramural sports, and helping parents and grandparents with home projects.

William “Billy” Phenicie



EDUCATION

Campbell University, Master of Business Administration student, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of Graduation: May, 2022. GPA 3.2. South Eastern Trust School Trust Management Scholarship.

WORK EXPERIENCE

City National Bank (May 2021 – August 2021) Summer Franchise Finance Intern within Specialty Banking. Assisted with multiple Franchise’s financial statements provided conclusions and recommendations. Primarily balance sheet and income statement analysis. The Franchisee provided all of the financial statements for their locations. I would then put the financials in Excel. After the Financials were spread through Excel, I would create a Trend Card. A Trend Card consists of the Franchise’s Executive Summary, background on the lenders, recent updates, recent credit actions, historical performance, risk rating, relationship strategy and projections forward for the remainder of the year and future quarters. City National Bank (May 2020 – August 2020) Summer Trust Intern. Facilitated numerous transactions and administrative work. Collaborated with all of the Trust department heads. Consulted with SEI & CSS systems, conducting transactions. Facilitated with Special Needs Trusts. I provided assistance towards administrative and discretionary work. I also assisted with Account/Trusts reviews. Veritex Community Bank (The Woodlands, TX) Holiday Intern. Shadowed multiple commercial lenders at different branches across the greater Houston area. Completed numerous loan distribution spread sheets throughout the duration of the Winter Internship. Attended client meeting around the city of Houston to discuss clients’ 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.

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, I have visited 34 states. 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.

Gerald H. Quinn, III



EDUCATION

Campbell University, Buies Creek, North Carolina. BBA in Trust and Wealth Management, Minor in Financial Planning, Campbell University MBA 4+1 Program. Expected date of graduation: May 2022. Cumulative GPA: 3.69. Dean's List, Presidential Scholarship, Southeastern Trust School Trust Management Scholarship.

WORK EXPERIENCE

Stuart Surlis Insurance, Angier, NC (December 2020-Present). Customer Service Representative: Key and process acres for crop insurance, make insurance payments for customers, take care of and teach policy and procedures to new employees. Hydro Works: Hydroseeding and Erosion Control, Kenansville, NC (May 2018-August 2020). Field Manager: Traveled and assisted in overseeing job sites, 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

Vice President of Camel Chapter Ducks Unlimited

Savanna Rocco



EDUCATION

Campbell University, MBA in Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning, Expected Graduation Day: May 2022, Ned B. Ball Business Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship. MBA GPA: 4.000, Undergraduate Cumulative GPA: 3.519

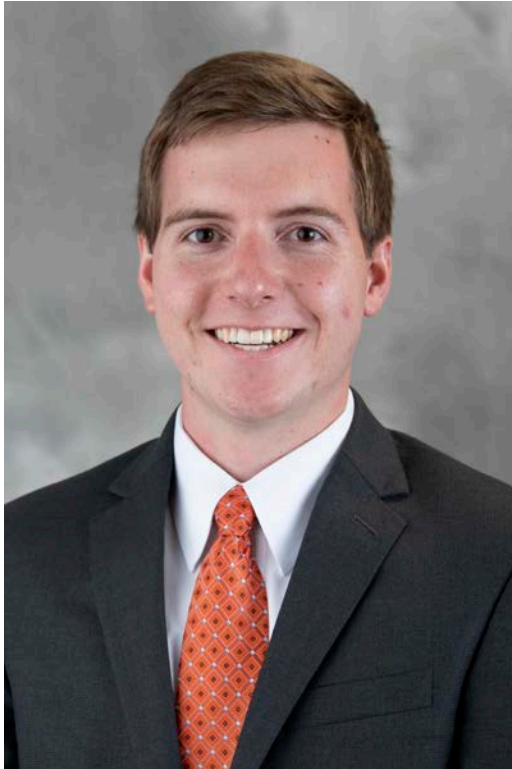
WORK EXPERIENCE

Synovus Trust Company Personal Trust Intern (Charleston, South Carolina) Intern for the Personal Trust Team June 2021 to August 2021. Help to establish and settle an inherited book of accounts. Interpreted Trust Documents and created a synoptic record for future use. Work alongside an experienced Relationship Manager to work through accounts. Collaborated with colleagues to complete projects for the department. 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, Student Worker for Campbell Athletics Ticketing, International Students Graduate Assistant for Student Services

Aaron Schnoor



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, B.S. in Economics, Minor in Financial Planning; Expected date of graduation: December 2021; GPA: 4.0. J.A. Campbell Scholarship, President's List, BB&T Business Fellow.

WORK EXPERIENCE

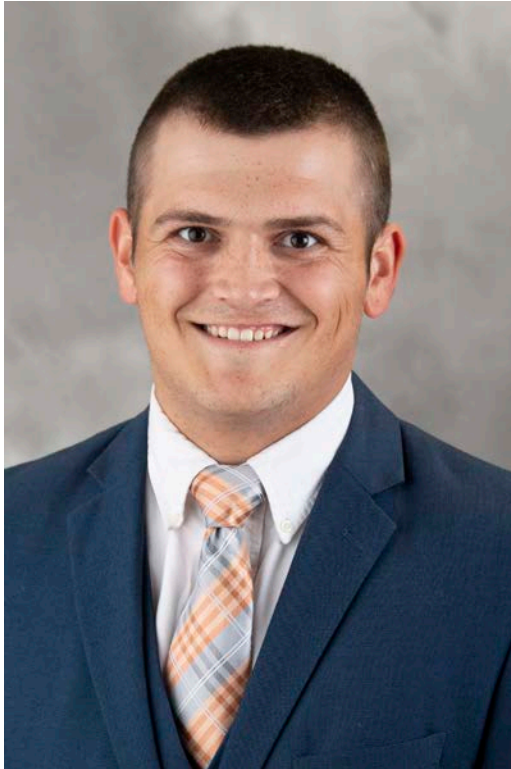
City National Bank, Orange County, California, Trust Administrative Intern; May-August 2019. Assisted in account openings for a trust onboarding project with 51 beneficiaries. Supported relationship managers by providing synopses of trust documents. Completed annual administrative reviews and updated 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 (CUSGA); Sophomore Class President, CUSGA Freshman Class President, CUSGA; Rules Committee Member, CUSGA; Student Conduct Committee Member, CUSGA; President, Inter-Organizational Council; Assistant Editor, Campbell Times student newspaper; Business Admissions Team.

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. Raleigh, North Carolina, Northwestern Mutual Company, College Financial Representative, June 1st- July 15th 2021. Became a licensed health and life insurance agent. Started my own portfolio as a financial representative. Connected with interns and agents across the state. Presented and listened to the ideas of myself and others regarding techniques for knowledge of the products as well as the art of selling the product.

EXTRACURRICULAR ACTIVITIES

Graduate Assistant for Campbell University's Fraternity and Sorority Life Play a variety of sports for intramurals A devoted member, as well as Intramural Chair for the Sigma Phi chapter of the Kappa Sigma Fraternity

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, North Carolina Life Insurance License, and North Carolina SIE.

WORK EXPERIENCE

Modern Woodmen of Ameirca, Associate Advisor, (Raleigh, NC) December 2020-Present. Developed relationships with clients in order to guide them in making sound financial decisions. Advised clients on

what kind of life insurance is appropriate for their situation and how much they should get. 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 Chairman.

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, Remote. Wealth Fiduciary Intern; June 2021-August 2021. Participated in weekly/monthly Governance Committee Meetings (Personal Trust Activity Working Group; Fiduciary & Trust Committee; Manager Evaluation Group Committee). Job shadowed with Director of Privately Held Investments (PHI), Regional Directors of PHI, Real Estate Officers, Closely Held Business Officers, and Mineral, Oil, and Gas Officers. Presented on book of business management practices to PHI Regional Directors. Determined fiduciary responsibility by reading various governing documents. Assisted with insurance policy reporting, inspections, and renewals. 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.

Thomas Webster



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning; Anticipated graduation date: May 2022; Major GPA 3.81, Overall GPA 3.62; Presidential Scholarship, Southeastern Trust School Trust Management Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, Lewis M. & Annabelle L. Fetterman Business Scholarship, Stuart L. Surles Business Undergraduate Scholarship, Edith C. & Raymond L. Mulkey Jr. Scholarship, Sandy Quakenbush Milam Scholarship, Top 10 Percent Award, Presidents List, Dean's List, BB&T Emerging Leaders Certification

WORK EXPERIENCE

Truist Wealth, Wealth Fiduciary Intern (Remote), June 2021-August 2021. Performed annual account reviews to ensure accounts were in compliance with regulations and ensured all necessary documentation was present. Reviewed and cleared exceptions made from previous

reviews. Created synoptic records by retrieving required documents and uploading them to the bot. Uploaded investment policy statements. Used SEI, SPV, AddVantage, iWork, and other software/databases to perform daily tasks. Hiester Wholesale Parts, Delivery Driver (Lillington, NC), November 2020-Present. Locate parts within the warehouse, deliver them to dealership or auto shop that ordered them in a timely manner, collect payments, stock new inventory deliveries and process returns. Cleveland Auto Spa, Linesman (Garner, NC), June 2017-August 2020. 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.

Nolan Wiggs



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2022. Cumulative GPA 3.80; Major GPA 3.85; Presidential Scholarship, Lamm, Floyd Lee & Minnie Deans Scholarship, Top Ten Percent Award, Lundy Fetterman Trust Business Fellows. Graduate Assistant. President and Deans list each semester.

WORK EXPERIENCE

Truist, Wealth and Fiduciary Intern (Risk and Compliance), June 2021-August 2021. Reviewed revocable trusts, governing documents, and investment policies for compliance with Regulation 9 standards. Creation of synoptic records from governing documents. Determined capacity and authorization for distributions. Account reviews to meet external and internal compliance requirements. State Employees Credit Union (SECU) Trust and Compliance Intern June 2020-August 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. Campbell University, Graduate Assistant (Event and Facilities Coordinator), August 2021-Present. Responsible for all events and activities of Campbell's student union center. Handling planning, booking, setup, and breakdown of events hosted by students, clubs, staff, and outside organizations. Assisted with events like fall graduation, blood drives, and group councils. 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, Treasurer, Secretary, Scholarship, and T-Shirt Chair of the Kappa Sigma Fraternity, IFC Delegate, and various intramural sports.

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, May 2020-August 2020, and May 2021-August 2021. 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.

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 3.48; 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, The BB&T Leadership Institute- Emerging Leaders Certification.

WORK EXPERIENCE

Truist Financial Corporation, Advisory Center Trust Intern, online-remote June 2021- August 2021. Supported several trust advisors in account closing by

handling non-monetary discretionary requests, general release agreements and final distribution forms. Prepared non-monetary discretionary requests and presented requests for approval to working group committee. Provided early termination notice letters to all qualified beneficiaries pertaining to each account. Worked closely with Advisory Center Team Lead to ensure proper closing of accounts. Gained exposure to all areas of wealth management through recurring discussions with each department. Developed a proficiency in CSS, Salesforce and iWork. Advocacy Trust LLC, Trust Fiduciary Intern, online-remote May 2020- July 2020. Presided over a real estate project that involved arranging 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 Advisor/ Logistics Personnel (Greensboro, NC) May 2018- May 2021. Performed logistic-related activities such as stocking, restocking and inventory control. Utilized advanced selling skills to promote the sale of the best solution for the customer. Provided an exceptional customer service experience by evaluating the customers' needs. Assisted new team members with merchandise-related activities through onboarding process. Maintained a safe and clean working environment.

EXTRACIRRICULAR ACTIVITIES

Campbell University Student Government Association (CUSGA); 2020-2021 Senior Class Vice President and Finance Committee Member, 2019-2020 Junior Class Representative and Academics Committee Chairman, Campbell University Black Student Association (CUBSA)

2019-2021, Lundy-Fetterman School of Business Dean Safety Council 2020-2021, Volunteered at Beacon Rescue Mission in Dunn, North Carolina, Intramural Sports.