



**CAMPBELL**  
**UNIVERSITY**

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Lundy-Fetterman  
**School of Business**

**Trust & Wealth Management**

**2022 - 2023**  
**Intern Placement Bulletin**

# Candidate List

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

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**Jonathan Askew**

**Ellia Bain**

**David Becker**

**Charitee Brown**

**Warren Brown**

**Britton Burley**

**Maria Carbajal**

**Eleanor Creed**

**Jessie Delacruz**

**Reagan Gee**

**Ayla Granberg**

**Tasmin Hart**

**David Hayes**

**Hannon Herring**

**Sebrina Herritt**

**Nicholas Jernigan**

**Carter Lewis**

**Evan Lewis**

**Peter Liefbrig**

**Hayden Long**

**Garnet Manley**

**David McAuthor**

**Jay McGill**

**Joshua McMillon**

**Derek Prillaman**

**Mia Ramirez-Parra**

**Jackson Shaw**

**Justin Shirley**

**Holden Simmons**

**Jose Solis**

**Grant Solmonic**

**Hunter Smart**

**Zachary Spaugh**

**Jonathan Whitmore**

**John Wilkes**

**Jared Williamson**

**Kevin Wood**

## Jonathan Askew

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### EDUCATION

Campbell University, Master of Business Administration 4+1 (proposed applicant), B.B.A in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2025. Overall GPA: 3.78. Recipient of scholarships including Scott Ellis Transfer Scholarship (highest award for transfers), Men's Track/Cross Country Scholarship. Campbell Dean's list 2022, University of Oklahoma Dean's list 2022 Spring & 2021 Fall. FAA private pilot ground school certified.

### WORK EXPERIENCE

The Marq at Southlake, Lifeguard (2018-2020), Whistle Britches Restaurant, Server (2021-2021)

### EXTRACURRICULAR ACTIVITIES

NCAA Division I Athlete, Pole Vault. Scholarship Chair of the Sigma Phi Chapter of the Kappa Sigma Fraternity. Managing a personal Cryptocurrency Blockfi account. 30+ hours into obtaining Private Pilot's License. Volunteer for North Central Ballet's 'The Nutcracker' Performance annually (2014-2017).

## Ellia Bain

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### EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: August 2024; GPA: 3.00. Lundy Fetterman School of Business Gordon B. Rowland Trust Scholarship, Lewis M & Annabelle L. Fetterman Business Scholarship, Out of State Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certificate, American Red Cross Adult First Aid/CPR/AED Certificate of Completion.

### WORK EXPERIENCE

Scotia Wealth Management (Nassau, The Bahamas) July 2022- August 2022 Fiduciary Summer Employee. Attend meetings, carefully create plans and portfolios that reflected the goals of the estate. File correspondence files. Create applications for clients. Campbell University Campus Recreation Fitness Desk Attendant (Buies Creek, North Carolina) February 2022- Present. Keep the facility and equipment clean and neat. Attend

all fitness staff training and meetings. Be attentive to patrons and their needs, maintain a safe environment for them to workout. Respond to all injuries/incidents and follow proper Emergency Action procedures (First Aid/CPR/AED certified). Wiggins Memorial Library Circulation Desk Worker (Buies Creek, North Carolina) December 2021 Present. Assisting patrons at the Research Assistance Desk by answering basic reference questions. Shelve and organize stacks. Answer phone calls. Offer printing assistance. John's Shoes and Accessories (Nassau, The Bahamas) December 2019. Holidays Sales Associate. Greet customers. Assist customers in deciding purchases. Stock and organize shelves. Bahamasair (Nassau, The Bahamas) June 2019-August 2019 Security Summer Student. Created documents for security worker schedule. Conduct plane searches, ensure all safety kits were in proper and correct condition, prepare planes for upcoming flights. File Documents. Bahamas Telecommunications Company (Nassau, The Bahamas) June 2017-August 2017. Human Resources Summer Student. Assisted with daily tasks including copying and filing resumes and creating cheques. Collaborated with senior employees to hold briefing seminars for upcoming summer students. Assisted with distributing cheques to summer employees. Volunteer/community service (Nassau, The Bahamas) 2016-2020. As a student of the prestigious institution of Queen's College. Community service was a requirement. I spent a total of 60 hours volunteering at The Bahamas Red Cross, The Ranfurly home for children and Queen's College.

### EXTRACURRICULAR ACTIVITIES

Active member of Campbell University Ransom, Active member of Campbell University Uplift, Member of The Progressive Liberal Party Golden Isles Constituency (The Bahamas), Youth Leader (The Bahamas).

## David Becker

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### EDUCATION

Campbell University, B.B.A in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2024; GPA: 3.421. Presidential Scholarship, North Carolina Needs Based scholarship, Eugene Maloney Trust and Wealth Management Endowed Scholarship, Dennis I. Bellefeuille School of Business Trust Endowment Scholarship.

### WORK EXPERIENCE

BeckerTerra. March 2022-Present. This is my own landscaping business, currently filed as sole proprietorship. Services include hedge trimming, planting, mulch and pine straw installation, minor land clearing, and lawn maintenance. Being owner and only employee, I also make schedules, plan finances, run advertisements and marketing. My 34 clients count on me for my attention to detail and superb communication; two things they do not find with other landscaping businesses. Becker Construction Apprentice Carpenter

and Assistant Project Manager. June 2018-Present. This is my dad's residential construction business. Involved in various activities around jobsites: scheduling, finances, figuring materials, etc. Assisted with the construction of various projects, such as houses, room additions, garages, decks, and concrete footings. Food Lion Retail Associate and Grocery Associate. May 2018-March 2020. Assisted customers in checking out their items. Stocked shelves and kept store organized. Helped customers find what they were looking for and tried to make the best out of their shopping experience.

### EXTRACURRICULAR ACTIVITIES

Some of my hobbies include fishing, traveling, and learning to play the guitar.

## Charitee Brown

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2025. Campbell University Promise Scholarship, Women's Basketball, Athletic book scholarship, Whitehead, Lettie Pate Foundation Scholarship, Federal College Work Study, Administrative on Campus Housing Scholarship, Holly Springs United Church of Christ Academic Scholarship, Hope Harvest Church Academic & Book scholarship.

### WORK EXPERIENCE

JumpStreet Indoor Trampoline Park Inc. Front desk staff, Court Attendant, and Party Host. As a hostess and concierge, I assisted guest with professional greetings and help them get checked-in by providing wristbands and exchanging cash and card transactions. I also enforced safety rules within the jumping areas and

attended to the children as they played to ensure peace and order for families. Polo Ralph Lauren Children's Sales Concierge. As a children's sales concierge, I created an easy shopping experience for customers by creating and providing style ideas for parents and constantly meeting weekly sales goals by being a hands-on worker. North Carolina Senate Page. As a high school student, I was given the opportunity to participate in legislative process by observing the law-making process while sitting in daily sessions and meetings. I assisted members and staff, including the senate by organizing paperwork and documents and answering phone calls. pOpShelf Backroom Associate, Stocker. As a backroom associate, I continuously organize the backroom with the new items received weekly through the trucks. I assisted customers on the floor when needed and continue to keep the floor full of items, so that the customers can have an easier experience.

### EXTRACURRICULAR ACTIVITIES

Member of the Campbell University Trust Fellows



## Warren Brown

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected date of graduation: May 2024; GPA; 3.169. Dean's List, Administrative On Campus Housing Scholarship, Presidential Scholarship, Peggy R. Lawrence Scholarship, Women's Basketball Scholarship, North Carolina Need Based Scholarship

### WORK EXPERIENCE

Black Student Association, Campbell Tartan, Male Practice Player for Women's Basketball Team, Club Basketball, Microsoft Word, PowerPoint.

### EXTRACURRICULAR ACTIVITIES

Member of the Campbell University Trust Fellows

## Britton Burley

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, Minor in Financial Planning, Expected date of graduation: May 2025; GPA: 4.0. President's List, Scott Ellis Merit Scholarship, Administrative on Campus Housing Scholarship, The T. Harry Gatton Trust Scholarship, The Jack Corbett and Annie Adams Surles School of Business Endowed Scholarship, The Dr. Ernest Paskel Sauls Business Scholarship

### WORK EXPERIENCE

Burley Boy's Lawn Service, Lawn Care Specialist, Harrells, NC (Seasonal Employee) June 2017 – August 2022. Provided care to multiple lawns in my neighborhood and ensured that customers were satisfied. Harrells Volunteer Fire Department, Volunteer Firefighter, Harrells, NC. March 2020 – Present. Responded to a wide variety of calls, and assisted people

who were in need. Trained for many hours in order to better serve my community.

### EXTRACURRICULAR ACTIVITIES

Campbell University Club Tennis, Campbell Intramural Sports, Camel Ducks Unlimited Chapter, Kappa Alpha Order Zeta Psi Chapter (Number VI – Purser); Microsoft Office Proficiency, Excel, Word, PowerPoint.



## Maria Carbajal

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected Graduation Date: Spring 2024. NC Golden Leaf Foundation Scholarship, Scott Ellis Merit Scholarship, G Fred Hale Memorial Business Scholarship, Southeastern Trust School Direct Aid, Band Performance Scholarship, Lettie Pate Whitehead Foundation Scholarship.

### WORK EXPERIENCE

Bookkeeper June 2021 to Present New Vision Logging Newton Grove, NC. Maintained financial data, controlled subsidiary accounts by verifying, allocating, and posting transactions, outlined and updated account summaries, charted historical records by filing documents and receipts. Office Assistant August 2020 to Present Food Lion Lillington, NC; Dunn, NC; Newton Grove, NC. Compiled office procedures including cash reports, money deposits, Western Union, money orders, and Coinstar. Collated and mediated

knowledge over all sales associate register functions and Front End accounting services, rendered the service desk section as well as the task of the customer lead, to-go, stocker, or sales associate as needed. Cashier April 2021 to September 2021 Han Dee Hugo's #8. Serviced POS transactions to about 300 customers every shift, issued refunds, maintained inventory and restocked shelves, received fuel trucks and wholesale vendors, compiled all reports for closing shifts. Accounting Specialist May 2019 to May 2021 Corner Cuke Market Spivey's Corner, NC. Tabulated and later in charge of payroll, bank reconciled, figured freight invoices, communicated with management, staff, and vendors to instill proper operations of the organization.

### EXTRACURRICULAR ACTIVITIES

Campbell University's Sound of the Sandhills Color Guard (2022), VITA/TCE Volunteer Tax Preparer (2022), Campbell University Student Accounting Society (2021-2022), Episcopal Farmworker Ministry Food Bank volunteer.

## Eleanor Creed

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2024; GPA: 3.319. Scott-Ellis Scholarship, Bradley & Kathy Creed Trust Endowment, Administrative on Campus Housing Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certificate.

### WORK EXPERIENCE

Assistant to Campbell University Assistant Director of Athletic Marketing (August 2022- Present). Assisted with capturing, producing, and editing promotional content for Campbell University football, soccer, and volleyball teams. Worked in teams with fellow student workers and athletic supervisors to create athletic engagement within the student body. Playa Bowls Shift Leader (May- August 2022). Created and served a variety of meals while utilizing strong customer service

skills. Single-handedly completed opening and closing procedures including opening and closing of the register, cash reconciliation, deep cleaning, and food preparation. Attained and enforced managerial skills as acting shift leader, directed and motivated employees, communicated with vendors, and implemented new marketing strategies and employee incentives. Babysitter and Nanny (January 2017- May 2022). Responsible for organizing daily schedules and controlling and engaging in activities with children of various ages. Effectively single-handedly supervised group activities with up to 15 children and administered daily medications. Sky Zone Charleston Cashier and Event Host (May- August 2019). Hosted birthday parties of size 5-25 for kids of all ages. Generated children and parental interest and excitement and ensured guest satisfaction from entry to departure. Coastal Christian Preparatory School Camp Counselor (May- August 2018). Managed large classes of children ages 2-12. Supervised check-in and check-out procedures. Wonder Works Sales Associate (June 2017- May 2018). Responsible for being knowledgeable about all products, creating product displays, generating customer interest, closing sales, and understanding point-of-sale system reports. Assisted customers from grandparents to young children by determining their needs and fulfilling them in an enthusiastic and creative manner.

### EXTRACURRICULAR ACTIVITIES

Phi Eta Sigma National Honor Society; Member, Campbell University Rotaract Club; Member, Alpha Delta Pi Sorority Iota Beta Chapter; Member.

## Jessie Delacruz

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### EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management. Expected date of graduation: May 2024. Dean's List, Presidential Honor Roll, Lettie Pate Whitehead Foundation Scholarship, Administrative On Campus Housing Scholarship, Campbell University Promise Scholarship, Academic Merit Scholarship, North Carolina Need-Based Scholarship, JROTC (Outside) Scholarship.

### WORK EXPERIENCE

Quality Painting & Cleaning Company, Lee, Moore, and Harnett County, NC. Managing Director, December 2017 - Present. I compute agreements and contracts for the business with the clients, bookkeeping (monetary): I track the expenses and revenue that goes through the business card, maintain contact with clients to ensure that they are content with what is being done and keep them up to date with the process, kept the marketing websites updated and connected with anyone

who was interested in being a client, worked part-time as a painter and cleaner, before the painting was done the walls would be cleaned and furniture around the walls would be covered or removed and after the painting was done I would make sure nothing was stained with paint, cleaned up all the painting supplies and washed them thoroughly to then load them on the work truck, clients who wanted their house to remain clean like how it was when we left it, they'd contact us for monthly house cleanings, and whatever interior or exterior paintings that need to be done in their house. Pilgrims (Seasonal employee) June 2021 - August 2021. I did labor work for 10 hours a day, Monday through Friday in temperatures of 45 degrees and lower. I would inspect the chicken to make sure it didn't have any bruises or broken bones, worked in the "Saddle Pack" line, and would place portions of meat in its required packet, cut the bones out of the meat, place 25 lbs of meat into a box, sealed it and sent it off to the trailers.

### EXTRACURRICULAR ACTIVITIES

Junior Class Representative, Campbell Student Government Association; Vice President, Campbell Activities Board; Treasurer, Campbell Hispanic Association; Worship Team Leader, FireStarters Ministry; Discipleship group, Campus Outreach; Chorus singer, Manatial De Agua Viva (Home Church); Donor (Essentials), Haven Shelter; Weekly bible study, Girls Firm Foundations, Culinary Team, Campbell Social Events.

## Reagan Gee

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant). B.B.A in Trust and Wealth Management. Expected date of graduation: May 2025; In major GPA 3.709, cumulative GPA 3.573. Dean's List, Scott Ellis Transfer Scholarship, Administrative on Campus Housing Scholarship, Benjamin M. Hawkins Trust Scholarship.

### WORK EXPERIENCE

Chick-Fil-A Front of house team member (2019-2020) Provided exceptional customer service and answered questions while working on the register. I coordinated with my other team members by communicating and helping them in order to improve efficiency. Additionally, I was in charge of the drive-thru, headset, handing the orders out of the window, and working the food line. Door Dasher during the summers of 2021 and 2022, picked up orders for customers, provided excellent customer service for clients.

### EXTRACURRICULAR ACTIVITIES

Member of Phi Beta Sigma Honor Society, Student Government Association (SGA), Assistant for Trust Advisor Institute, Orientation leader for the University, Captain of the Track and Field and Cross-Country team in High School, Club Soccer, Intramural Volleyball, Proficient in Microsoft Word, Excel, PowerPoint, and Google Docs.



## Ayla Granberg

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### EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2024. Cumulative GPA: 3.68. President's List, Dean's List, Peggy R. Lawrence Trust Scholarship, Presidential Transfer Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, D.P. & Helen Russ School of Business Scholarship, Dr. Ernest P. Sauls Business Scholarship. United States Marine Corps Leadership and Management Course, Graduated August 2019. United States Marine Corps Supply Chain Management, Graduated April 2017. Truist Emerging Leaders Certification, August 2022.

### WORK EXPERIENCE

Trust Client & Advisor Services Intern Analyst at Wells Fargo Bank, N.A., June 6, 2022 – August 12, 2022. Examined file documentation to update required

parties to act field on approximately 800 accounts. Investigated over 200 closed accounts for proper fund disbursement allocations. Screened the overdraft report daily to assure the correct upkeep of account balances. Customer Service Representative at Wake County ABC, August 2021 – Present. Provide outstanding customer service by greeting customers, answer questions and resolve customer complaints, assist customers with locating products. Operate register and process payments by cash, automatic debit, or credit card; issue change due and receipts to customers. Maintain organized, clean, and well stocked cashier station. Center Store Associate at Food Lion, August 2020 – August 2021. Provided fast, friendly, quality customer service to shopping patrons. Maintained grocery shelves by cleaning, stocking, and organizing allocations from tag to tag. Replenished merchandise on the sales floor in a timely manner. Trained new associates on Food Lion's policies and procedures. Aviation Supply Specialist at United States Marine Corps, September 2016 – September 2020. Conducted technical research, validated, and processed more than 1,500 requisitions. Maintained Protected Stock levels for 37,125 total line items worth more than a total EMV of \$125,000,000. Established a Global Communications System management program. Developed Support Packages for deploying units. Administrative Assistant at McCormick Law Office, July 2015 – August 2016. Developed system to track postage and copies for each of the more than 100 personnel files. Answered multi-line phone system and assist caller with their questions or concerns. Promptly respond to email and mail correspondence. Organized correspondence and documents into logical order within each personnel file. Theatre Crew at New Richmond 8 Theatre, February 2013 – August 2014. Greeted customers and sold tickets, concessions, and gift cards. Prepared theatres for the next showing of each movie. Trained new employees on concessions and ushering procedures.

# EXTRACURRICULAR ACTIVITIES

Marine Corps Martial Arts Gray Belt



## Tasmin Hart

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A in Trust and Wealth Management, Minor in Financial Planning, expected date of graduation: May 2024, GPA 3.245. Campbell University Promise Scholarship, Women's Tennis Scholarship, Women's Tennis Room and Board, Athletic book scholarship, Athletic Insurance Coverage. Certification acquired: Brian Hamilton Foundation's Starter U Certificate.

### WORK EXPERIENCE

Employed as a part-time assistant tennis coach for 40 Love Tennis Academy at Killarney Country Club in Johannesburg, South Africa, May-August 2021. Coached and taught children aged 3-13 in both group and private lessons. Group lessons consisted of setting up specific drills to help improve point play, live ball as well as fitness and endurance levels for long matches, helping the children find a balance in working hard as

well as having fun. Private lessons consisted of forming a personal and trusting relationship with the player, improving his or her technique, working on specific areas in which the player was lacking. Responsible for contacting each player's guardian to set up appropriate lesson times, organize more or fewer lessons, adapting to schedule changes (occurrence as a result of weather, school; injuries), setting up equipment at least 15 minutes before lessons as well as clearing equipment right after a day's work is over, maintain a clean and safe playing environment. Keeping daily contact with the head coach and owner of the tennis academy, Danie Van Zyl, to discuss progress in each lesson, payment methods, feedback, honesty for number of hours completed.

### EXTRACURRICULAR ACTIVITIES

Guitar player, acoustic as well as electric.

## David Hayes

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### EDUCATION

Campbell University B.B.A in Trust and Wealth Management, Minor in Financial Planning. Expected graduation: May 2024. Crosby scholar athlete. Scott Ellis scholarship receiver, Faith Hill grant..

### WORK EXPERIENCE

Fusion 360, Business Development Intern, Charlotte NC. As a Business Development Intern I aided my supervisor in establishing connections with future clients as well as scouting via LinkedIn. Statesville Country Club, Banquet Server, Statesville NC. Tasks included; preparation and setting up for occasions such as weddings and business meetings. Hayes Excavating and Farms, Statesville NC. In this broad role I worked in the manual labor side of the business as well as the office space. In the field directing a team to accomplish the tasks set in front of us for the day. In the office I specialized in creating invoices, estimates, and proposals for current and upcoming jobs.

### EXTRACURRICULAR ACTIVITIES

Member of the Campbell University Trust Fellows

## Hannon Herring

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), Trust and Wealth Management Pre- Law. Expected Date of Graduation: May 2024. Cumulative GPA: 3.6; Dean's List, Presidential Scholarship, Thomas H. and Judith O. Folwell School of Business Endowed Scholarship, and recipient of the Lundy Fetterman School of Business Fellows award.

### WORK EXPERIENCE

State Employees Credit Union June 2022-August 2022 Trust Planning Intern Raleigh, North Carolina Learned how complete and log planning worksheets, plan estate planning essentials program appointments, scan and log will files, scan and log power of attorney documents, and completed discretionary distribution requests. Work duties included managing weekly tasks assigned, rotating through the daily activities listed above, and job shadowing. Gained experience in various trust planning software's, utilized teammates to answer trust rep calls, and participated in weekly TAC meetings. Wealth Fiduciary Intern for Truist, June 2021- August 2021. Learned how to utilize various banking websites which allowed for the completion of assigned tasks. Work duties included managing spreadsheets, uploading investment statements, performing annual account reviews, and reviewing irrevocable trust accounts. Home Constructor, member of the Framing Crew for Whitehead Enterprises, June 2020- August 2020. This job was comprised of all components necessary to the construction of building a house or remodeling bathrooms. Recorded measurements, operated saws, used nail guns, and utilized many other essential tools for the job. Participated in demolition, remodeling, constructing, and fine finishing. Cashier, Customer service, at Medical Village Pharmacy, May 2017- July 2019. Properly operated a register along with advanced medical system the pharmacy uses to keep track of all the customer's medications. Answered phone calls from customers and relayed their needs to the pharmacists. Was responsible for managing inventory of pills, filling prescriptions for checking, cleaning the pharmacy, and restocking shelves with drugs and home goods.

### EXTRACURRICULAR ACTIVITIES

Sigma Phi Chapter of the Kappa Sigma Fraternity, member of the Accounting Club, and member of the Truist Business Fellows.

## Sabrina Herritt

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Masters of Business Administration (proposed applicant); Expected Graduation: May 2024. Overall GPA: 4.0; Major GPA: 4.0, Presidents List (4 semesters); Campbell University Presidential Scholarship, Presidential Transfer/Phi Kappa Scholarship, Women's Track/ Cross Country Scholarship, Women's Track/ Cross Country Room and Board, Marine Corps Foundation Scholarship, Freedom Alliance Scholarship.

### WORK EXPERIENCE

Wells Fargo, Financial Administrator Intern (Minneapolis, Minnesota), June 2022- August 2022. Campbell University Campus Recreation, Intramural Sports Official (Buies Creek, North Carolina), September 2021- Present. Worked closely with the Family Office Team that handled clients with 50 million dollars and up to read, Interpret, and apply trust documents while working on numerous projects.

Submitted Trust Money Movements for cash when overdrafts were found. Communicated with investment managers on accounts that needed trades to be made or cash raised. Met with a variety of other personnel from other positions in the bank. Learned the rules of a wide variety of sports games and then enforced the rules to the athletes competing in the sports leagues. Sonic Drive-in, Carhop (Jacksonville, North Carolina), February 2019- May 2019. Performed cleaning duties such as, washing dishes, sweeping, mopping, and disinfecting, in order to keep equipment and facilities sanitary. Greeting guests, taking their orders, preparing their food, delivering food, and collecting their payments. Received payments from cash and credit card, issued refunds, and applied discounts. Upheld an energetic attitude while performing customer service. American Pools Association, Manager/Lifeguard, (Camp Lejeune Military Base, North Carolina). June 2017- September 2018. Supervised other lifeguards to make sure they were performing their duties accurately and efficiently. Inspected all aquatic equipment. Performed open and closing duties. Dealt with complaints from patrons and workers. Coordinated training for lifeguards and aided in training under supervisor watch. Signed for deliveries and chemicals. Marine Corps Community Services, Lifeguard, (Camp Lejeune Military Base, North Carolina). February 2015- January 2017. Supervised all swimming activities while ensuring that guidelines, policies, and safety procedures are being followed by patrons. Performed first aid when injuries occurred, rescues swimmers when in distress or in danger of drowning. Cleaned the aquatic facilities and pool and performed Chlorine residual water tests while keeping record of levels. Certified Babysitter (Iwakuni, Japan). February 2012- June 2013. Certified in CPR, First Aid, and Babysitter certified. Watched children to identify behaviors, both positive and negative. Informed parents of daily tasks and activities their children performed while under my care.

## EXTRACURRICULAR ACTIVITIES

Campbell University Varsity Division 1 Cross- Country and Track Team (2019-Present). Campbell University Student Athlete Advisory Committee representative in the subcommittee of International Student Athlete Support (SAAC). Member of Delta Phi Epsilon and holds the Alumni Coordinator position, support and participate in our philanthropies of National Association of Anorexia Nervosa and Associated Disorders (ANAD), Cystic Fibrosis Foundation, and the Delta Phi Epsilon Educational Foundation. Girl Scout (2008-2013)



## Nicholas Jernigan

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management. Expected date of graduation May 2025. Scott Ellis Merit Scholarship

### WORK EXPERIENCE

Mac's General Merchandise, Benson, NC. As a cashier/manager, was tasked with handling the money of the company, observing what items were selling out the most and the ones selling the least, used quick critical thinking to solve problems, exemplified excellent customer relations, and making sure it was a clean environment. Camp Dixie, Elizabethtown, NC, As a Summer Camp Counselor/Lifeguard/Staff, given the responsibility of looking after children, excelled using great time management skills, putting forth effort to make customers want to come back the following year, keep a high level of focus at all times, became CPR and First Aid certified, maintained customers satisfied at all

times. Keith Hills, Lillington, NC, As a Cart Boy, assisted keeping members satisfied, along with cleaning carts and putting them out for customers.

### EXTRACURRICULAR ACTIVITIES

Campbell University Accounting Club, Kappa Alpha Order Zeta Psi Chapter (Number IV), Campbell University Intermural Sports, Camel Ducks Unlimited Chapter, Microsoft Office Proficiency, Word, PowerPoint.



## Carter Lewis

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, Expected date of graduation: May 2025, GPA: 3.91, Wayne Community College, Associate in Arts, credit hours transferred to Campbell, Phi Theta Kappa Honor Society, Campbell University President's List, Phi Kappa Phi Honor Society, Truist Business Scholar, Scott Ellis Merit Scholarship, First Citizens Bank Scholarship, Chick-Fil-A Remarkable Futures Scholarship, Wayne County Health Department Scholarship, Dr. Ernest P. Sauls Business Scholarship, Truist Business Scholars Scholarship, Betty & Alan Schilpp Scholarship, RA Housing Scholarship, Administrative On Campus Housing Scholarship, Eastern North Carolina Firefighters' Association Scholarship.

### WORK EXPERIENCE

Campbell University, Community Assistant, Lillington, NC. (August 2022-Present) Assisted students with facilities complaints, lock-outs, and the safety and security of residence halls. Created a sense of community in the residence halls through engaging events. First Citizens BancShares Inc., Summer Float Sales & Service Representative, Greater Goldsboro, NC area. (May 2022-August 2022) Assisted clients with banking activities including deposits, withdrawals, check transactions, and foreign currency exchange up to \$10,000 with a high degree of knowledge and professionalism. Improved banking relationships and retention by promoting branch offers for credit cards, mortgages, loans, and specialized merchant services. Chick-Fil-A, Inc., Front-of-House Team Member, Goldsboro, NC. (January 2020-January 2022) Prepared guest orders and requests while exemplifying a "my pleasure" attitude, strong customer service skills, and precision in task management. Ensured customers had a quality dining experience by offering suggested products and rectifying issues. Promoted from a cashier role, to traffic management, to a drive thru order processing position. Recognized as employee of the week in March 2020.

### EXTRACURRICULAR ACTIVITIES

Vice President of Recruitment, Future Business Leaders of America Chapter (FBLA), IPHC YouthQuest Short Sermon Alpha National Winner, FBLA National 3rd place Macroeconomics, Impromptu Speaking Finalist, Campbell University First-year Peer Mentor, Campbell University Club Tennis, Gold Rock Marketing Futures Education Certification, (non-university affiliated) Campbell Investors' Association Founder. Proficient with Microsoft Office and Google Suite.

## Evan Lewis

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2025; GPA: 3.815. Dean's List, Scott-Ellis Merit Scholarship, Administrative on Campus Housing Scholarship, First Citizens Bank Scholarship, Dr. Ernest Paskel Sauls Business Scholarship, Mary Paschal Trust Scholarship, Campbell University Cheer Scholarship.

### WORK EXPERIENCE

Campbell University Student-Athlete (August 2022 Present). Trust Education Foundation Trust Advisor's Institute, Student Assistant (Summer 2022). Assisted instructors in the execution and maintenance of the ATFA certification course, and attended all classes given by these instructors. Merchants Distributors Inc. Warehouse selector, Hickory NC (May 2021-Present).

As a warehouse selector I worked on a team in a production base. job where I remained diligent and level-headed in timed scenarios. Fairvalue Hometown Grocery Store, Customer Service Representative and Cashier, Granite Falls NC (September 2020-May 2021). In this role I assisted with fulfilling customers' various requests, as well as handling transactions for the company. Foothills Gymnastics Training Center, Gymnastic Coach, Hickory NC (May 2019 - July 2020). With this position, I spent the majority of my time coaching and teaching gymnastics to children of all ages. In addition to this task, I was also required to speak with and update the parents on the performance and progress that these children made.

### EXTRACURRICULAR ACTIVITIES

Campbell University Cheerleading, Recruitment Chairman of the Phi Delta Theta Fraternity North Carolina Zeta Chapter, Campbell University Wind Ensemble, Sound of the Sandhills Marching Band, Member of the Club Spikeball Team, Intramural Sports.

## Peter Liefbrig

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of Graduation: May 2025. Wake Tech Community College, Associates in Arts, Scott Ellis Transfer Scholarship, Administrative on Campus Housing Scholarship.

### WORK EXPERIENCE

Athletic Facility Supervisor, Holly Springs Parks and Recreation, Holly Springs, NC. May 2018 – Present. As a Facility Supervisor I oversaw our multi-purpose sports complexes and parks during rentals and athletic events. Primary tasks included assisting the renters with preparations for their field(s) with precision and expertise regarding their specific sport while providing exemplary customer service. Responded to injuries in a timely manner with certified First Aid and CPR experience. Secondary tasks included maintaining the

facilities consisting of acquisition and disposal of waste and various seasonal maintenance including but not limited to power washing, rust prevention, turf repair and construction of new equipment. Athletic Aide, Holly Springs Parks and Recreation, Holly Springs, NC. April 2017 - May 2018. As an Athletic Aide I assisted the Facility Supervisors at rentals with acquiring initial lineup cards, maintaining the correct information on the scoreboards, observed the games for injuries and recorded changes in data pertaining to specific sports.

### EXTRACURRICULAR ACTIVITIES

Campbell University Club Baseball, Campbell University Student Accounting Society. Microsoft Office Proficiency, Word, PowerPoint.

## Hayden Long

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A in Trust and Wealth Management: Expected date of graduation: May 2025. Wayne Community College Associate in Arts (Graduated 2021) Lundy Fetterman School of Business Endowment Scholarship. Brian Hamilton Foundations Starter U Certificate. Attended Trust Advisors Institute as a student worker.

### WORK EXPERIENCE

Trust Advisors Institute, Campbell University. Worked as a teaching assistant which caters to people in the trust industry to continue their education. Listened to course lectures and while taking notes to further understanding of subject matter. Helped students with course material such as financial planning, estate planning, and tax planning strategies. Learned trust fundamentals and given the opportunity to review a real trust case delivered to the student. Helped students with directions

and general hospitality in a professional and courteous manner. Seymour Funeral home, Assistant Funeral Director, December 2019-August 2022. Tasked with creating playlists and background multimedia for the funeral services. Assisted with responding to phone calls regarding pricing and scheduling, making deliveries to the post office, dropping off equipment at clients' homes, delivering and verifying paperwork, general cleaning, taking down tents and other equipment after services, as well as media management of the funeral service. Greeted clients while providing directions and instructions related to funeral services. Directed traffic and organized parking of funeral service for quick entry, dismissal, and a smooth service.

### EXTRACURRICULAR ACTIVITIES

Campbell University Club Tennis Team, Lundy Fetterman School of Business Future Business Leaders of America member, Hiking, Cooking, Campbell Investors Association (not university affiliated) officer.

## Garnett Manley

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management; Expected Graduation: May 2025; GPA: 4.00. President's List, Campbell University Presidential Scholarship, Men's Golf Scholarship, Administrative on Campus Housing Scholarship, Kenneth & Judie Satterfield Endowed Scholarship, Thomas & Judy Folwell Trust Management Scholarship.

### WORK EXPERIENCE

Campbell University Student-Athlete, Buies Creek, NC; 2020 – present. Central Virginia Junior Golf Association, Tournament Administrator, Lynchburg, VA; May 2019 – August 2019. Operated junior golf tournaments. Managed the tour website and communicated with golf courses to set up events. Assisted junior golfers in abiding by the rules of tournament golf. Forest Youth Athletic Association,

Youth Basketball Scorekeeper, Forest, VA; December 2017 – March 2018. Operated the game scoreboard and recorded the official game statistics. Communicated with players, coaches, and referees to ensure the games were played under the league rules.

### EXTRACURRICULAR ACTIVITIES

Campbell University Men's Golf Team, Volunteer Assistant Golf Coach for Jefferson Forest High School, Mentor for Junior Golfers.



## David McAuthor

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### EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: August 2024. Scott-Ellis Scholarship, Faith Grant, Federal Pell Grant, North Carolina Need Based Scholarship, Federal Educational Opportunity Grant, Administrative On Campus Housing Scholarship.

### WORK EXPERIENCE

John Hiester Chevrolet. As a Product Specialist, I assisted customers with vehicle research, sales paperwork, budgeting, and purchasing. Zaxbys, Erwin, NC. In this role, I filled customer orders to ensure a quality experience and maintained store cleanliness. Dunn Pal Media Arts Coordinator. In this role, I supported research, planning, production, and satisfactory completion of youth public service announcements, documentary films, and other media projects. IGA Grocery Associate, Benson NC. Assisted

with inventory management and helped customers locate various products throughout

### EXTRACURRICULAR ACTIVITIES

Tartan Orientation Leader, Campbell Gospel Choir Musical Director, Gods House of Prayer Youth Leader, Dunn Pal Volunteer/Mentor; Microsoft Office Proficiency, Word, PowerPoint.



## Jay McGill

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### EDUCATION

Campbell University, Master of Business Administration, B.B.A in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2024. Overall GPA: 3.43. Recipient of many scholarships including: Presidential Scholarship, Fetterman, Lewis M & Annabelle L Business #1 Scholarship, The Prillaman, Gregory Lee Trust Business scholarship, Baptist Foundation Luther H. Butler Scholarship, Croft, Herbert Stanley Trust Education Scholarship, Clark Brothers Business Scholarship, and Sauls, Dr Ernest P. Business Scholarship. 2020, Bladen Community College Graduate with an Associate of Arts Degree.

### WORK EXPERIENCE

Fort Caswell Staff Member (2016), White Lake Marina (2017-2021), supervised a work team of 8 at White Lake Marina (2019-2021), launched and managed a landscaping business maintaining 5 properties (2017-2021), Campus Recreation at Campbell University, refereed multiple sports (2021), Campus grill at Campbell University (2021). Manage a personal stock portfolio (2020-2021), State Employees Credit Union Trust Services Intern (2022 Summer).

### EXTRACURRICULAR ACTIVITIES

Grand Treasurer of the Sigma Phi Chapter of the Kappa Sigma Fraternity. Intramural sports. Club Tennis. Small group bible study. Volunteer at White Lake Church Camp and Retreat center, cleaning rooms and serving food. Serve the homeless in New York City by giving out care packages and feeding the homeless at The Bowery Mission and The New York City Rescue Mission.

## Joshua McMillon

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### EDUCATION

Campbell University, Master of Business Administration (Proposed Applicant) with BBA in Trust and Wealth Management/Pre-Law, Minor in Financial Planning. Expected date of Graduation: May 2025; Administrative on Campus Housing Scholarship; Scott Ellis Transfer Scholarship; Trust Management Alumni Scholarship; Kieth Thomas Joseph & Anne Bell Business Scholarship, North Carolina Need based Scholarship, 3 year national ROTC Scholarship.

### WORK EXPERIENCE

Department of Defense-U.S. Army, 82nd Airborne Division All-Source Intelligence Analyst (March 2019-Present, Ft.Bragg). Upheld Army values and diligently worked alongside many Intelligence professionals ranging from Force Command 2-star Generals to Division Command Sergeant Majors in joint operations in response to global crises such as operations in Afghanistan and Iraq and the Russia Ukraine War.

Earned Distinguished honor graduate and gained a promotion during Army Basic Training Course Class of 2019. YMCA Lifeguard (May 2015- May 2018 Ft.Bragg). Ensured that all safety and lifesaving gear/equipment is in full operational order and is readily and easily accessible at there locations. Made sure all swimmers are accounted for at all times. Maintained daily logs and records of patrons utilizing the pool and amenities. Assist in maintaining pool and surrounding area in clean condition. Monitored chlorine content in the pool to ensure compliance with Base standards. Aided in rescuing patrons in distress utilizing various lifesaving gear and equipment and administers first aid as required. Performed other duties as also assigned.

### EXTRACURRICULAR ACTIVITIES

NCARNG Honor Guard(2020-2021); Boy Scouts of America Troop 713: Eagle Scout Mentor (2018-2020); Campbell University Rugby Team (2021); Campbell University Black Student Association, Campbell University Veterans Association; Campbell University Intermural Sports; Campbell University Campus Recreation Facility Attendant.

## Derek Prillaman

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### EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2024; GPA: 3.716. Dean's List, Trust Business Scholar, Campbell University Presidential Scholarship; Administrative on Campus Housing Scholarship; Wells Fargo Team Members' Dependent Children Scholarship; National Society of the Daughters of the American Revolution Scholarships; Veterans of Foreign Wars Essay Contest Scholarship; Lundy Fetterman Business Fellows Scholarship; Grace White & Gilbert Thomas Stephenson Scholarship; School of Business Student Body Scholarship; The Newkirk Family Trust and Wealth Management Scholarship; Dr. Ernest Paskel Sauls Business Scholarship; The Lewis M. and Annabelle L. Fetterman Business Scholarship; The Bonner H. and Wilma D. Jones Endowment; Lundy Fetterman School of Business Student Body Scholarship

### WORK EXPERIENCE

Wells Fargo Bank N.A., Wealth and Investment Management Intern/Analyst; Winston-Salem, North Carolina (June 2022-August 2022) supported the philanthropic client management team, completed annual account reviews, performed account maintenance and tax-exempt filing activities, assisted with account closings, researched and dispositioned outstanding checks, participated in calls with grant, scholarship, client management team, and other members of the philanthropic services department. Gained experience using SEI Trust 3,000, Trust Gateway, FileNet, GuideStar, SharePoint, and additional software. Campbell University Lundy-Fetterman School of Business, Trust and Wealth Management Graduate Assistant/Student Worker; Buies Creek, North Carolina (January 2022-Present), help varying faculty members with tasks relevant to the Lundy-Fetterman School of Business, assist the Director of Development for Advancement and the Head of Trust and Wealth Management program. Twiddy and Co. Realtors, Field Services Intern, Corolla, NC. As a field services intern, I assisted guests with various tasks such as troubleshooting issues with homes while exemplifying a high level of professional guest service. Marine Federal Credit Union, Banking Intern, Sneads Ferry, NC. As a banking intern, I ensured members had a favorable experience while assisting head teller with accounts. Jordan's Catering, Local's Ice cream, Surf City, NC. In this role, I filled customer orders to ensure a quality experience and maintained store cleanliness. Publix Supermarkets, Grocery Associate, Surf City, NC. Assisted with inventory management and helped customers locate various products throughout the store. North Carolina Senate, Office of Senator Harry Brown, Senate Page, Raleigh, NC. As a senate page, I assisted various senators with campaign tasks, attended assembly and assisted in the ceremonies.

## EXTRACURRICULAR ACTIVITIES

Treasurer, Lundy Fetterman School of Business FBLA Chapter; Student, Truist Business Scholars Program; Treasurer, Campbell University Club Tennis; Member, Camel Ducks Unlimited Chapter; Truist Emerging Leader Certification; Microsoft Office Proficiency, Word, PowerPoint.

## Mia Ramirez-Parra

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### EDUCATION

Campbell University, B.B.A in Trust and Wealth Management Pre-Law, Minor in Financial Planning. Expected date of graduation: May 2024. Administrative On Campus Housing Scholarship, Campbell University Promise Scholarship, Federal Pell Grant, North Carolina Need Based Scholarship, L. Stuart Surles School of Business Scholarship, Dr. Ernest P. Sauls Business Scholarship, Jenkins, Sue Weddle & B.W. Memorial Scholarship. Certifications acquired: Brian Hamilton Foundation's Starter U Certificate, Microsoft Certification.

### WORK EXPERIENCE

CAPTRUST Financial Advisors, Compliance Department Intern, Raleigh, NC. As a Compliance Department Intern, I reinforced books and records by conducting a summer project involving Alternative Investments and Private Covered Securities. Guided through the Company's Compliance Department Software (MCO) completing various tasks such as processing mergers and acquisitions as well as initiating the off boarding process. College Democrats of North Carolina, Finance Associate. Assisted in fundraising and accomplishing goals. Applied research and data into fundraising, as well as keeping donor research and donations organized. Nash County Parks and Recreation, Site Supervisor, Nashville, NC. Over sought projects and managed staff while maintaining safety protocols and implementing site procedures. Duties included preparing and filing reports, handling emergencies, and managing facilities control during a pandemic. One Connection Inc., Sales Associate, Wilson, NC. Assisted in showcasing and selling cell phone products. Interacted with customers throughout all phases of the sales process. Ensured of customer satisfaction through excellent sales service as well as assisting in customers needs and delivering information on products.

### EXTRACURRICULAR ACTIVITIES

Campbell University Student Government Association, Freshman and Sophomore Class Representative, Sophomore Class Secretary, Junior Class Vice President, Secretary of Diversity and Inclusion Committee, Campbell College Democrats Treasurer, CDNC Financial Director and Executive.



## Jackson Shaw

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in trust and Wealth Management, Minor in Financial Planning: Expected date of Graduation: May 2025; GPA: 3.062. Dean's list, Truist Business Fellow, Scott Ellis Merit Scholarship, Administrative on Campus housing Scholarship, Alumni Book scholarship, Lundy Fetter School of Business Fellows, Jerry M and Betty B Wallace Trust Scholarship.

### WORK EXPERIENCE

Dale Similton Christian Basketball camp, Coach, Indian trail, North Carolina. (Jan 2021 - currently seasonal) I assist my former Basketball coach with spreading the word of God, while we educate and train kids from fifth to eighth grade about the skills and fundamentals of basketball. I was tasked to coach a small group into a team and then Coach them in a scrimmage at the end of camp each day. Pet House Sitting, Monroe, North Carolina. (Jun 2019- currently). I dog sit several clients' homes while they are away, and I monitor the Dogs three to four times a day, I also ensure the house is in the same condition as it was when they left. House of Pearls, Volunteer, Monroe, North Carolina. (Oct. 2020- February 2021) I accepted donations, organized and sorted items, priced the products, found display locations for items. I also maintain cleanliness and communicated with Donors on the stores acceptance policies.

### EXTRACURRICULAR ACTIVITIES

Truist Business Scholar Program, Campbell Intermural Sports, Weightlifting, Golf, Church Volunteer.



## Justin Shirley

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### EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected date of graduation: May 2024; GPA: 3.902; President's List, Dean's List, Presidential Scholarship, Top 10 Percent Award, Truist Business Scholars Award, Dr. Ernest P. Sauls Business Scholarship, John Hill Trust and Wealth Management Scholarship, Becky T. Kelly School of Business Scholarship, Lewis M. and Annabelle L. Fetterman Business Scholarship #2.

### WORK EXPERIENCE

Walgreens (Garner, NC), Customer Service Associate, June 2022-August 2022. Greeted and took care of any customer requests while running the cash register. Maintained and utilized knowledge of all sales, promotions, and store policies. Jersey Mike's (Sanford, NC), Team Member, June 2021. Learned how to effectively multitask in a timely manner. Collaborated

with fellow employees about ways to efficiently complete duties and tasks. Shirley Electrical (Wendell, NC), Laborer, June 2018-August 2018. Assisted other employees in keeping the work site clean and organized. Improved technical and communication skills by working with seasoned employees.

### EXTRACURRICULAR ACTIVITIES

Member of the Lundy Fetterman School of Business Truist Business Scholars, intramural sports.

## Holden Simmons

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. In Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2025. Scott Ellis Scholarship, Administrative on Campus Housing Scholarship.

### WORK EXPERIENCE

North Carolina Zoo, Environmental Services Employee, Asheboro, NC. As an environmental services employee, I assisted guests with a variety of tasks, questions, and concerns while maintaining a clean and safe environment. Dali Distributing, Office Assistant, High Point, NC. In this role, I handled incoming calls and other communication, managed files and important documents, prepared items for shipments, and received incoming shipments. Walmart, Stocking and Unloading Employee, Asheboro, NC. In this position, I organized and stocked various products while keeping the aisles clean and accessible. Assisted customers with price

checks and helped locate items in the store. Worked with team members to unload shipments and sorted products to designated areas.

### EXTRACURRICULAR ACTIVITIES

Current Vice President and former Marshal of the Zeta Psi Chapter of Kappa Alpha Order at Campbell University.

## Jose Solis

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management, Minor in Financial Planning. Expected graduation: May 2024. Received multiple scholarships including Scott-Ellis Scholarship; North Carolina Need Based Scholarship; James W. Narron and C. Gary Johnsey Trust Scholarship. Received Dean's List. Wells-Fargo Undergraduate Trust and Wealth Management

### WORK EXPERIENCE

Wells Fargo Data Analyst; June 2022 - August 2022. Worked as an intern during the summer for the North-East/Farb team in Wilmington, Delaware for ten weeks. Helped manage account reviews every week to make sure everything was up to standard or created open items for the Trust Officers in charge of those accounts. Participated in three projects alongside the normal work that was given as part of day-to-day responsibilities.

Learned the managerial skills necessary to multitask and prioritize what objectives to complete to be efficient. Understanding the trust documents of each account and what to do when a problem arises to that specific account based on those documents. Applied understanding on how to work in a corporate setting and use a system specific to that organization.

Intramural Referee and Supervisor at Campbell University, March 2021 – Present. Officials are tasked with the responsibility to provide a safe environment where players can be competitive and have fun at an appropriate level to maintain fairness, control, and safety. Coordinate with the supervisor so that players understand the rules and respect each other while following said rules. Provide a friendly, upbeat, and customer service-oriented environment.

Local Campaign Intern; September 2018 – November 2018. Worked as a campaign intern during the local election. Went door to door asking local people questions about the upcoming election at the time. Given the responsibility to help manage a team when going out to local neighborhoods to coordinate with three other teams in surrounding neighborhoods. Ensured that efficient operations of daily office operations so that my fellow interns had an easier time when out on the field. Increased popularity for candidates by talking about what their policies would be if elected to their positions.

## EXTRACURRICULAR ACTIVITIES

Treasurer of the Phi Delta Theta Fraternity North Carolina Zeta Chapter, Member of Club Spikeball Phi Eta Sigma National Honor Society, Intramural Sports Referee and Supervisor, Campbell Catholic.

## Grant Solmonic

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### EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2025; GPA: 3.94. President's List, Dean's List, Presidential Scholarship; Administrative On-Campus Housing Scholarship; The David D. Butler Trust Education Foundation, Inc. Endowed Scholarship; The Dr. Ernest Paskel Sauls Business Scholarship; The Willis and Marguerite Gupton Scholarship.

### WORK EXPERIENCE

Global View Capital Advisors, Intern, Winston- Salem, NC. Assisted Branch Supervisor with financial planning duties. Engaged in both client financial planning meetings and corporate strategy sessions; initiated, prepared, and executed client workflows and checklists to ensure timely completion of client account tasks; organized, updated, and developed Customer Relationship Management (CRM) data; created several new reports consolidating client review and customer satisfaction data. Utilized a spectrum of financial planning software tools including: the Global View Capital Advisors platform consisting of Investment, Retirement, Insurance, Education, Tax, and Estate modules; Wealthbox CRM tool for financial advisors; and Ameritrade's Veo One virtual agent platform. Advance Landscaping, Entrepreneur, Winston-Salem, NC. Built new landscaping business from the ground up with two high school friends. Created successful marketing campaign utilizing brochures and sales calls to obtain multiple accounts.

### EXTRACURRICULAR ACTIVITIES

Member of Phi Eta Sigma National Honor Society. Designated as Youth Group Leader, Peace Haven Baptist Church. Competed athletically as Campbell University Intramural Basketball teammate as well as on North Carolina Amateur Athletic Union state basketball championship team. Volunteered at ABC of North Carolina Child Development Center serving children with autism, Down syndrome, cerebral palsy, and behavioral issues by teaching them to read. Served as Miracle Hill in Motion supervisor at fundraiser for one of South Carolina's largest homeless shelters. Possess basic comprehension of Spanish language. Interests include basketball, history, and international travel.



## Hunter Smart

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Master of Business Administration (proposed applicant) Expected Graduation Date: May 2024; Cumulative GPA: 3.737. 1 semester Dean's List and 3 semesters President's List. Presidential Scholarship, Top 10 Percent Award, FFA Scholarship, and Keith, Thomas Joseph & Anne Bell Business Scholarship. Jerry M & Betty B Wallace Trust Scholarship

### WORK EXPERIENCE

Advocacy Trust ( Mooresville, NC) Trust Administrator Intern Assisted a team of Trust Administrators with an extensive book of special needs trust accounts Organized client distribution trackers and account reviews daily Shadowed an experienced team of Trust Officers Mabry's Drug and Home Care (Hamlet, NC) Customer Service/Delivery Technician Managed and contacted a list of around 1000 home health oxygen patients using Excel Delivered patient medication daily

Provided customer service for patients in office and over the phone

### EXTRACURRICULAR ACTIVITIES

Campbell University Student Accountant Society Hobbies: Photography (including managing a small side business on social media), Intermural Volleyball, and Small Group

## Zachary Spaugh

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### EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: December 2023; Overall GPA: 3.78; Dean's List; President's List; Lundy Fetterman School of Business Fellows Scholarship, Scott-Ellis Scholarship, Dr. Ernest P. Sauls Business Scholarship, Benjamin M. Hawkins Trust Scholarship, Newkirk Family Trust Management Business Scholarship, Lewis M. and Annabelle L. Business Scholarship, NC Baptist Scholarship Program, John Hill Trust and Wealth Management Scholarship, Susanna Murray Bus Klimczak Scholarship, Peaden's Seafood Restaurant Catering BUS Scholarship

### WORK EXPERIENCE

Wells Fargo, Philanthropic Services, Winston-Salem, NC, Summer Intern; June 2022- August 2022. Stopped and reissued outstanding checks. Completed AARs.

Completed 1023 application forms and sent them to lawyers. Assisted admins with additional tasks. Moravian Ministries Foundation of America, Winston-Salem, NC, Summer Intern; May 2021- July 2021. Grant consultant for the MMFA 2021 Grant Cycle. Advised applicants on which grant to apply for based on their proposed project and funding interests, process for submitting grant requests, and how to make their applications stand out from others. Received grants and organized them in MMFA database. Tracked and organized data detailing the 2021 grant cycle, and prepared and presented this information to the MMFA Discretionary Grant Advisory Committee. Organized and updated MMFA database using Raiser's Edge NXT. Made updates to new MMFA website, using WordPress, in preparation for its launch. Organized all previous MMFA Board meeting minutes in chronological order. Led a project to analyze investment models used at comparable foundation of faith. Cedar Lakes, Raintree, Little Creek Condominium Complexes, Winston-Salem, NC, Assistant Maintenance Worker; 2017-2021. Assisted in general upkeep and maintenance of all three condominium complexes. Work included painting, carpentry, plumbing, electrical, concrete, and general cleanup of complexes.

### EXTRACURRICULAR ACTIVITIES

Lundy Fetterman School of Business: Business Fellows member, Campbell University Residential Learning Community: LEADS member, Campbell University Marketing Club: member, Boy Scouts of America Troop 703: Eagle Scout, Boy Scouts of America Troop 703: Assistant Scout Master, First Baptist Church of Welcome Youth Council: member

## Jonathan Whitmore

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### EDUCATION

Campbell University: Master of Business Administration (Proposed Applicant), BBA in Trust and Wealth Management, Minor in Financial Planning, Expected Graduation May 2026, Men's Football Scholarship, Campus Housing Scholarship, Athletic Book Scholarship.

### WORK EXPERIENCE

Seasonal Employee for the Charlotte Knights as a Concession Worker (2017-2019). Learned how to work as a team and learned how to use cooperation skills and communication. Learned how to collaborate with a group of fellow employees to efficiently get the job and tasks done.

### EXTRACURRICULAR ACTIVITIES

Campbell University Football Team, Defensive Line (2020- present). Community Services with the Boys and Girls Club in Lillington, North Carolina. Serviced the Campbell Residence Life by taking out mattresses and resupplying them with mattresses for the University.

## John Wilkes

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### EDUCATION

Campbell University, Pursuing Master of Business Administration (4+1 Program), B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: December 2023. GPA: 3.589. Men's Football Scholarship, Scott-Ellis Scholarship, Administrative On Campus Housing Scholarship, Schilpp Betty and Alan Scholarship, Athletic Book Scholarship, Men's Football Room and Board Scholarship. Big South Conference Academic Honor Roll (2020). Dean's List (2020).

### WORK EXPERIENCE

Fiduciary Intern, Truist Wealth, Atlanta, GA; Virtual (May 2022 – August 2022). Conducted financial analytics to help investment managers serve their clients. Engaged in valuable research on emerging markets and their effects on individuals' portfolios. Created investment policy statements for the compliance department using information gathered from Salesforce.com. Glossary Author, Atticus Probate and

Estate Settlement, (April 2022 – Present). Created an online glossary consisting of probate and estate settlement terms for their online estate settlement and inheritance distribution service. Seasonal Employee at Hillbilly Produce Company, Charlotte, NC (2015-Present). Work as an assistant selling seasonal products. Extend a welcoming greeting to customers and assist them with all aspects of the purchasing process. Review inventory on the lot and replenish products as needed. Accurately unpack and organize inventory shipments. Responsible for transporting and securing trees to vehicles. Manage transactions accurately including cash, credit, and checks, and balanced cash register at the end of shifts. Youth Sports associate, YMCA, Charlotte, NC (2017-2018). Maintain order and fairness while officiating youth football, basketball, and soccer. Collaborate with other officials to problem solve and make the games a good experience for the youth. Encourage Charlotte youth to develop a strong work ethic in a fun environment while teaching valuable life skills such as discipline, teamwork, and good sportsmanship. Strong entrepreneurial spirit: creation of my own eBay store reselling items and maintaining a 100% positive customer satisfaction rating, as well as utilizing social media to secure various short-term jobs including moving furniture, yard work, and personal training. Responsible for the heavy lifting of customers' furniture and household items while using caution and care in the handling of these items. Organize, pack and transport items of all sizes and types. Also involved in the building of pools, fire pits, and the landscaping of yards.

### EXTRACURRICULAR ACTIVITIES

Campbell University Football Team, Linebacker (2019 – Present). Campbell University Football Unity Council: Lead a Division 1 football team as one of two voted representatives from each class

to serve as the governing body of the team consisting of over 100 men, while working closely alongside the coaching staff and other elected teammates to provide feedback and suggestions to promote an exceptional team experience. Campbell University Student Athlete Advisory Committee (SAAC): facilitate communication and involvement between student-athletes and administrators, as well as the rest of the student body. Meet every month to address specific concerns, as well as plan events.



## Jared Williamson

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), Minor in Financial Planning: Expected Date of Graduation: May 2024; GPA: 3.379, Dean's List, Presidential Scholarship, Administrative On Campus Housing Scholarship, Charles D. "Skip" Fox, IV School of Business Trust Scholarship, Lewis M. and Annabelle L. Business #1 Scholarship, Dixie Youth Baseball Scholarship

### WORK EXPERIENCE

Campbell University Campus Recreation Intramural Supervisor. As an intramural supervisor I assist in organizing and running various intramural sports, while providing answers to players if asked. Lowes Fulfillment Associate. Organized and staged all customer orders while providing excellent customer service and critical thinking opportunities. Campbell University Campus Recreation Intramural Official. While being an intramural official I officiated various

intramural games, keeping processes organized and clean. Automotive detailer. Developed and fulfilled requirements of a detailing business while assisting and marketing to customers.

### EXTRACURRICULAR ACTIVITIES

Campbell University Sigma-Phi chapter of Kappa Sigma Fraternity, Various Intramural Sports.

## Kevin Wood

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### EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2024; Cumulative GPA: 3.897. President's List, Dean's List, Truist Business Scholar, Truist Emerging Leadership Certification. Received Presidential Scholarship, Top Ten Percent Award, James E. Witherspoon Trust Scholarship, Moen Incorporated Scholarship, School of Business Student Body Scholarship, David D. Butler Trust Scholarship, Harold B. Wells Entrepreneurship Scholarship, Dr. Ernest P. Sauls Business Scholarship, Lewis M. and Annabelle Lundy Fetterman Business #2 Scholarship, Fred G. Hale Memorial Business Scholarship.

### WORK EXPERIENCE

Trust and Wealth Management Intern, State Employees' Credit Union, Raleigh, NC, internship; July 2022-August 2022. Examined client estate planning documents to identify fiduciary roles and distribution language. Reviewed estate planning documents and planning notes to determine planning techniques. Communicated with Trust Officers to prepare reviews for distribution requests. VITA Volunteer Tax Assistant, Internal Revenue Service, Lillington, NC; January 2022-April 2022. Prepared tax returns for the volunteer tax help and preparation sight in Harnett County, NC for Campbell University. Conducted quality reviews of tax returns and answered taxpayer questions regarding their specific return and the return process. Auctioneer, Mouths of the South Auction Company, Benson, NC, part-time; July 2021-present. Carry out wishes of the client or client's estate by selling of personal and/or real property through means of an auction sale. Coordinate with head auctioneers and client to organize items and property for sale. Obtained customer service skills by dealing with auction customers and answering questions regarding the auction process. Peer Mentor, Campbell University Lundy-Fetterman School of Business, Buies Creek, NC, July 2020-present. Developed leadership skills by leading a group of five to seven freshman students through their transition to college. Taught students how to implement the Design Thinking process for use on class projects. Enhanced communication skills by communicating and delivering project materials to students for use in the BADM-100 class.

### EXTRACURRICULAR ACTIVITIES

Member of Truist Business Scholars at Campbell University, April 2021-present; Member Phi Eta Sigma Honors Society, April 2021-present.