



# TRUST AND WEALTH

CAMPBELL TRUST + WEALTH MANAGEMENT



**CAMPBELL**  
UNIVERSITY

Lundy-Fetterman  
School of Business

# TRUST AND WEALTH MANAGEMENT

Welcome to an exploration of one of the most unique undergraduate programs at Campbell University. In fact, Campbell’s Trust and Wealth Management Program is the nation’s first, and still the only, undergraduate degree program of its kind in the United States. Part of the Lundy-Fetterman School of Business, the Program prepares graduates to serve the financial needs of high-net-worth individuals by managing their assets and by developing and implementing sophisticated tax, financial and estate planning strategies.

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## PROTECTING AND GROWING FAMILY WEALTH FOR FUTURE GENERATIONS

While the Program has produced high paying jobs for many years, the future for graduates of the Trust Program has never been brighter. Over the next 20 years, the largest transfer of wealth in American history will occur as Baby Boomers pass their assets to the next generation.

On the surface it may appear that the focus of a Trust professional is solely managing assets. Graduates quickly realize the focus of their work is to help people in some of their most critical times of need. During the advisement process, a Trust professional naturally develops a personal relationship with families and individuals.

Graduates of our Program are recognized nationwide for their people skills, hands-on experience gained from internships, work ethic and technical expertise, and are prepared to take their place as leaders in the financial services industry. The world's largest banks actively seek to employ Campbell Trust and Wealth Management graduates and interns.

Come be a part of this exciting and rewarding profession.

# MESSAGE FROM THE DIRECTOR



“ I INVITE YOU TO PURSUE AN EXCITING CAREER IN TRUST AND WEALTH MANAGEMENT. THE TRUST PROGRAM IS DEMANDING, YET VERY REWARDING. ”

Over 2,000 alumni are now working with many of the nation's premier financial institutions, including: U.S.

Trust/Bank of America, Wells Fargo, J.P. Morgan Chase, Northern Trust Company, BB&T, SunTrust, Regions and First Citizens Bank. Successful graduates can be found in nearly every major city in the United States.

There is a tremendous demand nationwide for our graduates. Over 95% are placed within one month of graduation with institutions throughout the U.S.

Trust is a very rewarding profession, both financially and emotionally. The job satisfaction of graduates of the Trust and Wealth Management Program is extremely high. Our graduates are proud of their profession and excited when they have the opportunity to assist families in need of their expertise.

Many of the students in the Campbell University Trust and Wealth Management Program came to Buies Creek planning to do something other than manage other people's money. Once we explain the nature of the industry, the nature of the profession and the structure of the Trust Program, students quickly change their minds and their major.

While students might initially have a vague notion that Trust has something to do with banking they quickly realize it is about being a

steward to others in the truest and best sense. In many instances they are called on to help with important life events. Trust professionals often become “a family member” to their clients.

What makes students majoring in Trust and Wealth Management at Campbell University appealing to the largest financial institutions in the country? They demonstrate:

- A STRONG WORK ETHIC
- A WILLINGNESS TO ACCEPT THE CHALLENGE OF A DEMANDING MAJOR AND FACULTY
- A STRONG SENSE OF WHAT IS RIGHT AND A PASSION TO ALWAYS DO WHAT IS RIGHT
- THE MATURITY TO CONSIDER A CAREER WITH UNLIMITED POTENTIAL FOR GROWTH
- THE ABILITY TO WORK EFFECTIVELY AS A MEMBER OF A TEAM
- A PASSION FOR HELPING OTHERS
- THE ENTHUSIASM TO LEARN AND GROW WITH THE PROFESSION AND NOT FEEL ENTITLED TO ADVANCE BEFORE THEY ARE READY

I challenge you to apply for admission to the Campbell University Trust and Wealth Management Program and join the “Campbell Trust Family” today.

**JIMMY WITHERSPOON, DIRECTOR**

TRUST AND WEALTH MANAGEMENT DEGREE PROGRAM  
CAMPBELL UNIVERSITY  
GRADUATE, TRUST PROGRAM, CLASS OF 1980  
PHONE 910.893.1387 | WITHERSPOON@CAMPBELLEDU

Over 95% of the TWM graduates are placed in full time jobs within one month of graduation provided they are willing to relocate.

# TRUST AND WEALTH DEGREE

## WHAT CAN I DO WITH A DEGREE IN TRUST AND WEALTH MANAGEMENT?

A degree in Trust and Wealth Management can lead to a wide variety of professions. Here are just a few examples:

### TRUST OFFICER:

typically serves as a member of first line management and is considered a senior professional within the organization. As such, the Trust Officer provides team or technical supervision. The organization will depend on this person's expertise and experience with complex technical activities. The primary responsibilities of the Trust Officer are customized and sophisticated banking, investment management, liquidity and credit management, tax planning, financial planning and estate planning for the affluent clients of the institution.

### INVESTMENT MANAGER:

guides asset management of various securities (stock, bonds and other securities) and other assets (e.g., real estate) in order to meet specified investment goals for the benefit of the investors. Investors may be institutions (insurance companies, pension funds, corporations, charities, educational establishments etc.) or private investors (both directly via investment contracts and more commonly via pooled investment vehicles, such as mutual funds or exchange traded funds.)



### FINANCIAL PLANNER:

is a professional who prepares financial plans for clients. These financial plans often cover cash flow management, retirement planning, investment planning, financial risk management, insurance planning, tax planning, estate planning and business succession planning (for business owners).

### CORPORATE ATTORNEY:

ensures the legality of commercial transactions by advising corporations on their legal rights and duties, including the duties and responsibilities of corporate officers. In order to do this, they must have knowledge of aspects of contract law, tax law, accounting, securities law, bankruptcy, intellectual property rights, licensing, zoning laws, and the laws specific to the business of the corporations that they work for. A Trust and Wealth Management degree provides a good foundation for the study of law and a career as a corporate attorney.

### ESTATE PLANNER OR TAX ATTORNEY:

anticipates and arranges for the disposal of an estate during a person's life. Estate planning typically maximizes the value of the estate by minimizing taxes and other expenses. However, the ultimate goal of estate planning is determined by the specific goals of the client and may be as simple or complex as the client's needs dictate. In order to do this they must have knowledge of tax law, trust law and the administration of trusts and estates. A Trust and Wealth Management degree provides a good foundation for the study of law and a career as a tax or estate planning attorney.

# BECOMING A CERTIFIED TRUST PROFESSIONAL

Campbell Trust Program graduates are eligible to take the examination for the nation's leading two Trust professional certifications.

## CERTIFIED FINANCIAL PLANNER™ CERTIFICATION (CFP®)<sup>1</sup>

Campbell University has the distinction of being registered with the Certified Financial Planner Board of Standards, Inc. Graduates of the Trust and Wealth Management Program are eligible to sit for the national CFP® Certification Examinations and earn this most prestigious of all certifications.

## CERTIFIED TRUST AND FINANCIAL ADVISOR (CTFA)

Graduates of the Campbell Trust Program may also choose to pursue the prestigious CTFA designation at some point in their career. The American Bankers Association offers the Certified Trust and Financial Advisor (CTFA) designation to Trust professionals meeting certain experience and education requirements. Trust officers wishing to receive the CTFA designation must pass a relevant examination. Students graduating from the Trust Program are eligible to sit for the CTFA examination upon completion of the work experience requirement.

<sup>1</sup> [CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC. OWNS THE MARKS CFP®, CERTIFIED FINANCIAL PLANNER™, AND FEDERALLY REGISTERED CFP (WITH FLAME LOGO) IN THE U.S., WHICH IT AWARDS TO INDIVIDUALS WHO SUCCESSFULLY COMPLETE INITIAL AND ONGOING CERTIFICATION REQUIREMENTS.]



"So many of the relationships I have built in my career are primarily as a result of the Campbell Trust Program. Not only has my trust education prepared me for the opportunities ahead, but the ongoing network of current and former Campbell graduates also continues to influence my career. I will forever be grateful and honored to be a part of the "Campbell Trust Family."

### PHILLIP STRICKLAND

SENIOR VICE PRESIDENT

MANAGER OF INSTITUTIONAL TRUST

FIRST CITIZENS BANK

CAMPBELL ALUMNUS & ADJUNCT PROFESSOR

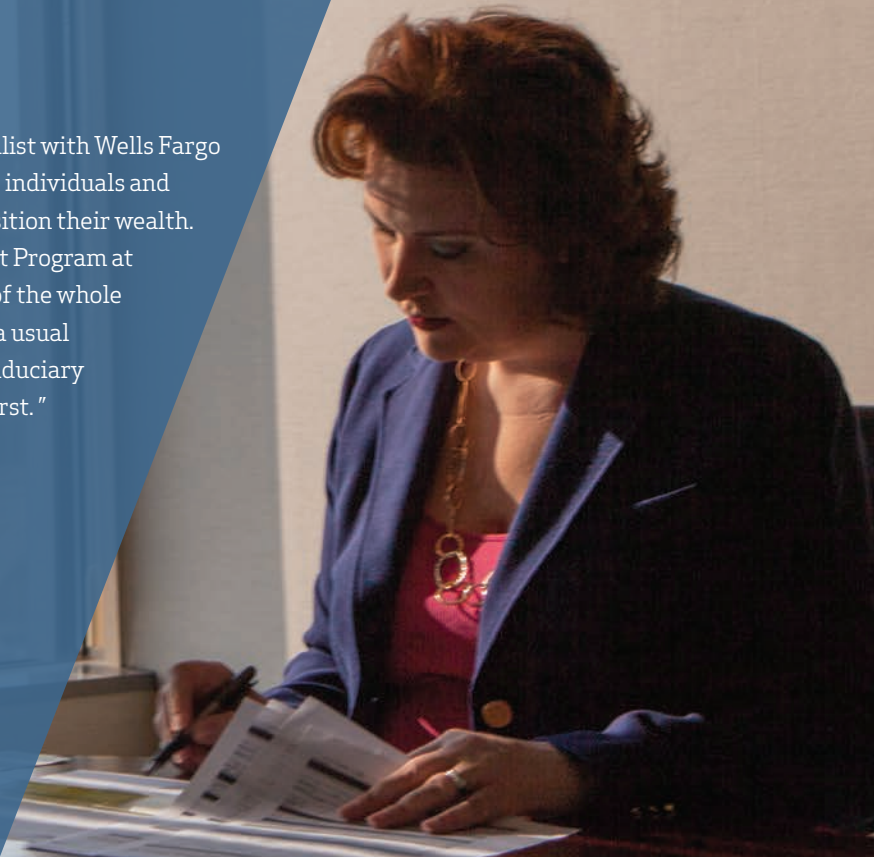
4/1 MBA GRAD CAMPBELL

CLASS OF 2006

"I am a fiduciary advisory specialist with Wells Fargo Private Bank. In that role, I help individuals and families build, preserve and transition their wealth. The Trust and Wealth Management Program at Campbell prepares you to be a part of the whole fiduciary world. It is not a world that a usual business major is accustomed to. In a fiduciary relationship, we put the client's needs first."

**KRISTY MEARES SIDES, JD**

SENIOR VICE PRESIDENT  
FIDUCIARY ADVISORY SPECIALIST  
WELLS FARGO PRIVATE BANK  
4/1 MBA GRAD CAMPBELL  
CLASS OF 2001



"Campbell University's Trust and Wealth Management Program sets the standard for others to follow. Campbell instills integrity, hard work and perseverance far different from any other institution. Obtaining my Trust and Wealth Management/Master of Business Administration (MBA) degrees from Campbell University has helped me continue making a difference for others as well as setting myself apart within the trust industry. I've often described this as the "Campbell difference." Campbell University not only teaches you what you need to earn a reputable degree but it imparts morals, standards of conduct, compassion and empathy within their students. Campbell's faculty genuinely cares for aspiring students and it is evident when you leave Campbell, as a graduate, you carry those qualities with you."

**JESSICA D. EVANS**

SENIOR VICE PRESIDENT  
TRUST SERVICES  
STATE EMPLOYEES' CREDIT UNION  
CLASS OF 2010: MBA, CLASS OF 2018



# PROGRAM OPTIONS

Typically over half of the trust majors choose to complete the 4/1 BBA/MBA degree program, receiving both their undergraduate degree and an MBA in a total of five years.

*There are three program options for Trust undergraduates:*

## 1. TRUST AND WEALTH MANAGEMENT CURRICULUM

In addition to the basic freshman and sophomore general education courses, all students are required to complete the 14 core Trust courses. Students graduate with a BBA. Often combined with the opportunity to participate in paid summer internships, graduates of the Trust Program are ready to contribute to employers immediately after graduation.

## 2. TRUST PRE-LAW

The Trust Pre-Law major better prepares students for the rigors of law school and develops some of the most outstanding attorneys in the country. The majority of the Trust faculty are attorneys and are well-versed in the academic rigors of law school. Classes are taught using the same teaching methods those students will later experience in law school, increasing the level of success for graduates in their legal studies.

Almost all Trust Pre-Law graduates are admitted to law school. Our alumni have graduated from law school at Campbell, Wake Forest, Duke, North Carolina, Florida, Yale and Virginia. Students enter already familiar with the subject matter they will study in law school. This includes property law, contract law, partnership law, corporate law, trust law, tax planning (income tax, state tax, gift tax, generation-skipping and fiduciary income tax), employee benefit planning, insurance planning, estate planning, and trust and estate administration.

## 3. BBA/MBA 4/1 PROGRAM

The third program option is a 4/1 BBA/MBA (Bachelor of Business Administration and a Master of Business Administration) Degree Program. Students take a combination of undergraduate Trust and graduate MBA courses in this program during their final two years at Campbell to earn the dual degrees. Students apply to the MBA program at the end of their junior year. Well over half of Trust students complete the 4/1 program. By enrolling in the 4/1 program the student will receive both degrees in a total of five years rather than six. Choosing to pursue the 4/1 program also allows the student to participate in a second paid summer internship, making them even more productive on the job from day one.



# COURSE DESCRIPTIONS

The course descriptions for these three options follow:

## REQUIRED TRUST COURSES

TRST 330	WILLS, ESTATES, AND TRUST
TRST 360	FINANCIAL PLANNING PRACTICES FOR FIDUCIARIES
TRST 400	FIDUCIARY LAW I
TRST 410	ESTATE TAXATION
TRST 411	GIFT AND FIDUCIARY TAXATION
TRST 415	OPERATIONAL FUNCTIONS OF A TRUST DEPARTMENT
TRST 420	FIDUCIARY LAW II
TRST 432	ESTATE PLANNING SEMINAR
TRST 434	TRUST AND ESTATE ADMINISTRATION
TRST 436	EMPLOYEE BENEFITS
TRST 439	INVESTMENTS AND SECURITY ANALYSIS
TRST 440	INVESTMENTS AND PORTFOLIO MANAGEMENT
TRST 470	TRUST SALES AND MARKETING

### Trust Course Descriptions

#### 330 WILLS, ESTATES, AND TRUSTS

A course designed to introduce students to the subject of property and interests therein, the distribution of property by intestacy or by will, trusts as dispositive devices, and the planning and administration of property in estates and trusts.

#### 360 FINANCIAL PLANNING PRACTICES FOR FIDUCIARIES

An overview of the practice of financial planning and financial situation analyses is covered. The course includes a study of the financial services industry; ethical standards and regulations for financial planners; the economic environment of financial planning; financial and accounting fundamental for financial planners; an integrative analysis of risk management, investment management, tax planning, retirement planning and simple estate planning.

#### 400 FIDUCIARY LAW I

A study of the origin and nature of trusts, methods of creating a trust, necessity of trust property, capacity to be a trustee, definiteness of beneficiaries and the transfer of their interests.



Our curriculum incorporates hands-on experience with the latest tools and software used within the industry.

#### 410 ESTATE TAXATION

A study of the basic principles of federal estate tax law and basic techniques to minimize the impact of the tax on the decedent's estate.

#### 411 GIFT AND FIDUCIARY TAXATION

A study of the basic principles of federal gift tax law, generation skipping tax law, and fiduciary income tax law. Emphasis will be given as to how to minimize the impact of gift, generation skipping and fiduciary income taxation.

#### 415 OPERATIONAL FUNCTIONS OF A TRUST DEPARTMENT

A study of organization staffing, policies, control procedures, and administration of a trust department. Provides the student with a foundation for understanding the role of effective management in achieving adequate profitability in a trust department. Emphasis is placed on the application of Regulation 9 of the Comptroller of the Currency and techniques for the development of new trust business, including prospecting techniques, sales talks, establishment of new business goals and maintenance of records.

#### 420 FIDUCIARY LAW II

A study of the administration of trusts, the duties and powers of the trustee, the liabilities of the trustee, and remedies of the beneficiary of third persons, the investment of trust funds, allocation and apportionment of receipts and expenses between principal and income, and the termination or modification of a trust.

#### 432 ESTATE PLANNING SEMINAR

A study of the principles of intestate law, taxes, and techniques of planning the disposition of property by will and trust. Fields covered include wills, inter vivos trusts, insurance trusts, pension and profit sharing trusts, and business buy-sell agreements. Semester case problem requires analysis and development of a plan and presentation to live participants. Considerable emphasis is placed on new business development and post mortem planning.

#### 434 TRUST AND ESTATE ADMINISTRATION

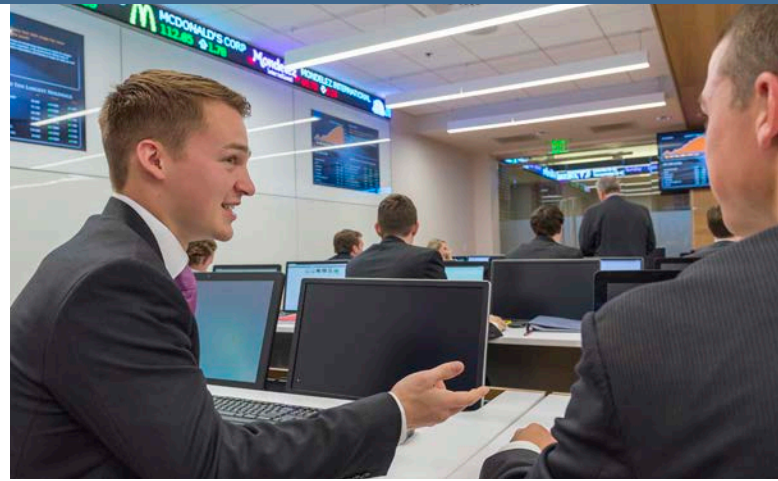
An examination of the administration and distribution of property in estates and trusts. The course will enable the student to understand and apply the state and federal statutes that govern such administration, including the Uniform Trust Code and the Uniform Probate Code. Particular attention will be paid to the understanding and implementation of trust documents and wills. The course will be highly practice oriented.

#### 436 EMPLOYEE BENEFITS

This course is designed to introduce the student to the various types of employee benefits that are provided employees by or through employers including corporations, sole proprietorships, and the self-employed. The course examines social security benefits and focuses on the basic concepts used in the establishment, administration, investment, and distribution of various Defined Benefit and Defined Contributions Plans. The student is exposed to the regulations and practices governed by ERISA and takes part in the review and development of a prototype plan. Several active employee benefit account managers are guests during the semester to provide the students a realistic application of the course of study.

#### 439 INVESTMENTS AND SECURITY ANALYSIS

A study of investments in securities of all types including stocks, bonds, mutual funds and derivatives. The course will study, among other things, types and measures of investment risk, bond and stock valuation concepts, asset pricing models and hedging and option strategies. The course will be designed for implementation of strategies within a financial institution, consistent with such institution's policies and procedures.



#### 440 INVESTMENTS AND PORTFOLIO MANAGEMENT

A study of the creation and management of investment portfolios. The course will study portfolio valuation and measurement concepts, asset allocation and diversification and investment strategies in tax-advantaged accounts. The course will also examine investment strategies in tax advantaged accounts. The course will also examine such investments theories as the efficient market theory, the capital asset pricing model, and modern portfolio theory. The course will be highly practice oriented. The course will be designed for implementation of strategies within a financial institution, consistent with such institution's policies and procedures.

#### 470 TRUST SALES AND MARKETING

A practical investigation of sales process and the marketing process from the trust banker's perspective. Topics include the evolution of the market for trust services, market opportunity assessment, market segmentation, development of marketing strategies, pricing of services, and personal selling.



"Campbell University's Trust Program prepared and launched me into a career far more successful and personally rewarding than I could have ever imagined. The trust industry as a whole provides an incredible opportunity to take care of individuals through some of the most difficult stages of their life: helping them maximize their wealth, create a legacy, and leave a lasting impact on their families, communities and the world. I encourage anyone with a passion for helping others, a desire for a professionally rewarding career, and a general intrigue for understanding the flow of wealth and business to consider Campbell's Trust and Wealth Management Program... I did, and am continually grateful for the life-changing opportunities it has afforded."

#### BEN HOPF

FOUNDER AND CEO  
ATTICUS, INC.  
4/1 MBA GRAD CAMPBELL  
CLASS OF 2011

## TRUST PRE-LAW ELECTIVE COURSES

ENGL 302	ADVANCED WRITING (PRE-LAW)
POLY 229	THE NATIONAL GOVERNMENT (PRE-LAW)
POLY 300	INTRODUCTION TO LAW (PRE-LAW)
PHIL 121	INTRODUCTION TO LOGIC (PRE-LAW)
THEA 115	PUBLIC SPEAKING (PRE-LAW)

### *Trust Pre-Law Course Descriptions*

#### **ENGL 302 ADVANCED WRITING (PRE-LAW)**

A course designed to improve the students writing skills beyond those taught at the lower division level.

#### **POLY 229 THE NATIONAL GOVERNMENT (PRE-LAW)**

This general introduction to the study of American government focuses on the federal level with special attention to the framing of the U.S. Constitution, the general organization and functioning of the national government, the nature of federalism, political parties, elections, and the current issues of public policy at the national level.

#### **POLY 300 INTRODUCTION TO LAW (PRE-LAW)**

An introduction and survey of the field of law for students interested in understanding the diverse nature of the field of jurisprudence and legal studies.

#### **PHIL 121 INTRODUCTION TO LOGIC (PRE-LAW)**

An examination of basic philosophical issues which arise in the fields of ethics, political philosophy, theory of knowledge and metaphysics.

#### **THEA 115 PUBLIC SPEAKING (PRE-LAW)**

A study of the principles of oral communication designed to increase a student 's skill in presenting ideas through speech, and developing vocal, physical, critical and analytical skills through actual speech performance.

Trust Pre-Law is a great major for those interested in the areas of estate planning, tax planning, business planning or in a career as a corporate attorney.

"The Trust Department at Campbell does an incredible job of preparing students for pre-law. A lot of the classes that you take in the Trust Department make it seem like it's a class designed for law school. When you get into law school, you already have studied nearly 50% of the content in undergrad. It makes contracts or estates and wills so much easier in law school."

#### **JAMES VANN, JD**

SENIOR PARTNER, VANN ATTORNEYS

CLASS OF 1986

2010 YOUNG DISTINGUISHED ALUMNUS AWARD  
RECIPIENT

## REQUIRED MBA COURSES FOR THE 4/1 PROGRAM

MBA 700	ORIENTATION TO INNOVATION, DESIGN THINKING & THE CAMPBELL MBA
MBA 710	ACCOUNTING FOR DECISION MAKING
MBA 720	APPLIED ECONOMICS FOR BUSINESS LEADERS
MBA 730	FINANCE AND CAPITAL MANAGEMENT
MBA 740	COMMUNICATION & CRITICAL THINKING FOR ETHICAL DECISION MAKING
MBA 750	ORGANIZATIONAL CULTURE IN A CHANGING ENVIRONMENT
MBA 760	BUSINESS ANALYTICS
MBA 770	DIGITAL AND CONTEMPORARY MARKETING STRATEGIES
MBA 780	GLOBAL SUPPLY CHAIN MANAGEMENT
MBA 790	STRATEGIC MANAGEMENT "LIVE CASE" SEMINAR

### 4/1 Program MBA Course Descriptions

#### 700 ORIENTATION TO INNOVATION, DESIGN THINKING & THE CAMPBELL MBA

This course is designed to provide new students in the MBA program with an orientation to the nature of today's evolving business environment as well as their graduate experience at Campbell University. Utilizing recognized assessment instruments, students will reflect on their individual strengths and begin their personal development journey. There will also be a focus on team building, design thinking, presentation skills, and leadership. (Credit Hours: 1, Prerequisites: None)

#### 710 ACCOUNTING FOR DECISION MAKING

A course dealing with the use of accounting data for purposes of managerial control and decision-making. Topics covered include budgeting, standard costing, profit planning, and emerging approaches for measuring productivity, quality, and financial performance. Includes lecture, problem sets, and case studies. (Credit Hours: 3, Prerequisites: None)

#### 720 APPLIED ECONOMICS FOR BUSINESS LEADERS

The course presents a balanced coverage of both micro- and macroeconomic concepts, theories, issues, problems, and policy alternatives pertinent to the United States in a global setting. Extensive case studies help to bridge the gap between theoretical rigor and practical "real-world" applications of political economy from managerial decision-making and policy makers' perspectives. (Credit Hours: 3, Prerequisites: None)

#### 730 FINANCE AND CAPITAL MANAGEMENT

A study of capital budgeting, financing, dividend, and working capital decisions. Topics include fundamentals of financial markets, valuation, shareholder-wealth maximization, financial statement analysis, cost of capital, asset pricing, hedging, entrepreneurial finance, and international financial issues. Case studies will supplement lectures, and a team project involving the development of a financial analysis of an actual venture/investment is required. (Credit Hours: 3, Prerequisites: None)

#### 740 COMMUNICATION & CRITICAL THINKING FOR ETHICAL DECISION MAKING

This multidisciplinary course examines communication techniques and strategies, while allowing students to practice and develop effective communication skills—particularly writing skills and presentation skills. Additional emphasis will be placed on critical reflection, problem solving, case analysis and communication of the challenges of ethical decision making, particularly in the business and organizational context. (Credit Hours: 3, Prerequisites: None)

Within our **50+** year program we've had over **2,000** graduates with a **95%** placement rate and almost **ALL** graduates who have applied to law school were accepted!

### 750 ORGANIZATIONAL CULTURE IN A CHANGING ENVIRONMENT

Based on a solid foundation of contemporary and classic scholarship, the course addresses organizational behavior theories and concepts in the context of current and emerging workplace realities. The course addresses the challenges associated with understanding, predicting, and controlling the behavior of individuals and groups in organizations and the impact of their behavior on the organization's bottom line. (Credit Hours: 3, Prerequisites: None)

### 760 BUSINESS ANALYTICS

This course examines systematic approaches and computer information systems available to assist in collecting, understanding, and utilizing the various amounts of data collected by organizations in order to assist with effective decision making. The focus of the course will be on the application and analysis of information and "big data" so crucial in business today. (Credit Hours: 3, Prerequisites: None)

### 770 DIGITAL AND CONTEMPORARY MARKETING STRATEGIES

A study of the changing role of marketing of goods and services through an analysis of organizational activities such as selection of the product mix, pricing, advertising and communications, marketing research, and channels of distribution. Environmental issues considered will include legal, social, ethical, cultural, ecological, and technical variables. A particular emphasis will be placed on digital and mobile marketing efforts. Case studies along with individual and group projects will supplement class lectures. (Credit Hours: 3, Prerequisites: None)

### 780 GLOBAL SUPPLY CHAIN MANAGEMENT

This course focuses on management and improvement of supply chain processes and performance at a global and domestic level. Students will explore important metrics for making supply chain decisions and will learn about tools for effective and efficient supply chain management, production planning, inventory control, order fulfillment, and supply chain coordination. Students will also investigate topics such as global supply chain design, logistics, and outsourcing, several other recent supply chain innovations. (Credit Hours: 3, Prerequisites: None)

### 790 STRATEGIC MANAGEMENT "LIVE CASE" SEMINAR

A capstone course for MBA students. In this course, students will be expected to use the knowledge and skills obtained in their graduate coursework in a "live case" consulting project with a local business or organization. Working in a team setting, groups will work with their assigned clients throughout the term to assist with the development of recommendations and strategies to address specific issues experienced by their client. The course will conclude with a professional consulting project document and presentation. (Credit Hours: 3, Prerequisites: Completion of a total of 21 credit hours of MBA courses)



"Campbell's Trust and Wealth Management Program is like no other major. When you graduate from the Trust program, you know what your future looks like. I was lucky to complete two internships prior to graduating which provided me with job opportunities once I graduated, even in 2009. From there, my education helped me obtain my CFP® and CTFA which has broadened my career opportunities. I have been with the same company since I graduated. I spent time on the trust administration side, I was able transition to our financial planning group for a few years and then eventually back to the Trust side as a Senior Trust Office. Mr. Witherspoon used to say in class that "working with families in a Trustee capacity it was almost like you were part of the family." With my experience, I have found that to be true. An individual's finances is one of the most private matters and the fact that someone trusts me to help them with that is a great feeling. If you want to help people and make a difference in someone's life, then the Trust and Wealth Management Program is a great option for you."

#### JULIE CAMERON, CFP®, CTFA

SENIOR VICE PRESIDENT;  
SENIOR TRUST OFFICER  
U.S. TRUST, BANK OF AMERICA PRIVATE WEALTH  
MANAGEMENT  
4/1 MBA GRAD CAMPBELL  
CLASS OF 2010

# MEET THE ALUMNI

The 2,000+ alumni of the Trust Program can be found nationwide in all major financial institutions. For more than 50 years, Campbell University Trust and Wealth Management Program has prepared more trust professionals and placed them in more financial institutions than any other program in the nation.

**YOU WILL QUICKLY DISCOVER THAT THE TRUST ALUMNI ARE A FAMILY, AND YOU CAN COUNT ON THEIR HELP WHEN YOU NEED IT.** They may be in Boston, Dallas, Atlanta, Raleigh, Chicago or Los Angeles; they may have graduated 50 years ago or last year. However, what they have in common is a sense of appreciation, of pride and of loyalty to Campbell University and to the Trust Program.

The alumni are our greatest resource in ensuring that today's students will have even better job opportunities going forward. Many serve loyally on the Board of Directors of the Trust Education Foundation, Inc. Others support the excellent intern program. All our graduates are proud to call themselves members of the "Campbell Trust Family."



"Campbell's Trust Program provided me with a unique opportunity to gain comprehensive and in-depth knowledge about the trust and wealth management industry. Not only has that education opened the door for an incredibly rewarding career, it has afforded me the opportunity to serve and care for clients through some of the most challenging periods of their lives. I am truly grateful to have been a part of this one-of-a-kind program."

## SARAH W. SCHMIDT

SENIOR VICE PRESIDENT  
FIDUCIARY STRATEGIST TEAM DIRECTOR  
FIDUCIARY AND INVESTMENT RELATIONSHIP  
MANAGEMENT  
BB&T WEALTH  
MTWM GRAD CAMPBELL  
CLASS OF 2010



“Campbell University’s Trust Program teaches the value of relationships, the meaning of true stewardship and the high level of responsibility that goes along with managing money for multiple generations. I learned how rewarding and meaningful it is to always put others’ interests ahead of my own. That lesson in humility has taught me the right way to treat clients, beneficiaries and associates. The Trust Program is the perfect fit for anyone that strives to make a difference in the lives of others.”

**RYAN A. NEWKIRK**

SENIOR VICE PRESIDENT/PRIVATE CLIENT ADVISOR

WELLS FARGO PRIVATE BANK

4/1 MBA GRAD CAMPBELL

CLASS OF 2001

2008 YOUNG DISTINGUISHED ALUMNUS AWARD RECIPIENT



**A PROUD HERITAGE FOR OVER 50 YEARS**

Graduates of the Trust and Wealth Management Program are proud of Campbell’s Business School’s national reputation.



# INDUSTRY SUPPORT

Our program and students benefit enormously from the financial support and influence of our alumni and friends in the trust industry. Their influence has led to the funding of scholarships for trust students by Wells Fargo and by U.S. Trust / Bank of America.

This influence has also led to major financial commitments including those made by our friends at BB&T, Fidelity Bank and First Citizens Bank. Most recently, due to the generosity of First Citizens Bank, that of several of our alumni and that of several of our friends, we have launched the First Citizens Bank Wealth Management Center. The Center benefits all the students in the Lundy-Fetterman School of Business, but in particular those majoring in Trust and Wealth Management.

Our students train on the latest and most sophisticated technology systems which make them more marketable to financial institutions. In many cases, our students will train on the same systems they will use on the job making them even more marketable.



“The job is never the same. Each situation it is unique based on family dynamics and what is held in the estate. No client owns the same assets; therefore, we have to be knowledgeable about a broad range of investment instruments.”

## KIMBERLY HAMILTON

VICE PRESIDENT  
ESTATE SPECIALIST  
FIRST CITIZENS BANK  
CLASS OF 2009



"I chose the Trust and Wealth Management field because I enjoy helping people and this is a people business. It is about helping families determine how they will pass their wealth on to succeeding generations."

**BRADLEY KELLY**

FINANCIAL ANALYST

A.J. WEALTH - NEW YORK, NY

4/1 MBA GRAD CAMPBELL

CLASS OF 2014



"Campbell University's 4/1 Trust and Wealth Management Program not only provided me with the tools necessary to compete with peers in a highly competitive market such as Boston—it also instilled a work ethic that is focused on dedication, the value of relationships, and placing the needs of others before my own."

**CHRISTOPHER KINLAW**

VICE PRESIDENT

TRUST OFFICER

U.S. TRUST

BANK OF AMERICA, PRIVATE WEALTH MANAGEMENT

4/1 MBA GRAD CAMPBELL

CLASS OF 2010

"I came to Campbell specifically because of the Trust Program. My father, a self-made man who grew up poor, taught me how to be financially literate. I was told about the Trust Program. Admittedly I did not know exactly what Trust entailed, but after I talked with Professor Witherspoon it became much clearer. I'm getting my start in "personal trust"—working with individuals. The Trust Program has prepared me for a career I know I will love."

**REBEKAH BARKER CHENEY**

PHILANTHROPIC TRUST ADMINISTRATOR

WELLS FARGO

4/1 MBA GRAD CAMPBELL

CLASS OF 2014



# INTERNSHIPS

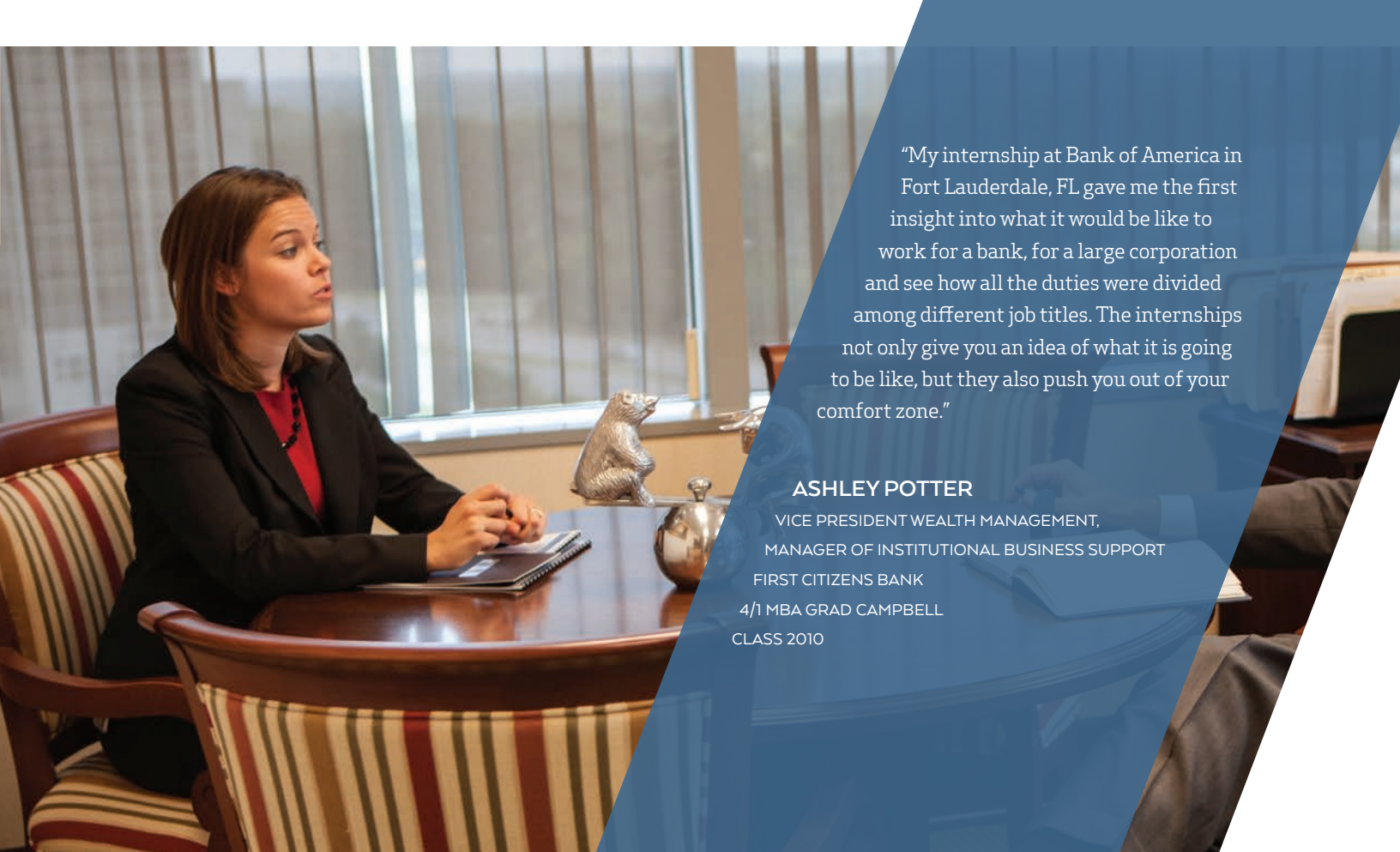
All students majoring in Trust and Wealth Management have the opportunity to earn at least one paid summer internship. Students enrolled in the 4/1 BBA/MBA program have the opportunity to earn two paid summer internships with financial institutions such as: U.S. Trust / Bank of America, Wells Fargo, PNC, Merrill Lynch, JP Morgan, BB&T and First Citizens Bank. In a typical summer, there are 50+ students working in cities such as New York, Chicago, Dallas, Los Angeles, Atlanta, San Francisco, Austin, Boston, Winston-Salem, Charlotte and Raleigh.

The internships are both challenging and rewarding. Interns are mentored by a senior manager, thus students have the opportunity to learn from the best in the industry. Real hands-on experience, coupled with compensation and the privilege of working for the nation's premier financial institutions are amazingly rare opportunities for students in today's world. Many interns are offered permanent jobs where they interned upon graduation from Campbell.

What is the key to being offered an internship? Employers look for students with a strong work ethic, maturity, strong communication skills, a passion for doing the right thing and the ability to work as an effective member of a team. At the start of their careers, it is essential for students to be open to the idea of relocating to where the opportunities are.

The Trust Internship Program affords students the rare opportunity to spend their summers in exciting cities across the country working with and shadowing experienced senior managers.





“My internship at Bank of America in Fort Lauderdale, FL gave me the first insight into what it would be like to work for a bank, for a large corporation and see how all the duties were divided among different job titles. The internships not only give you an idea of what it is going to be like, but they also push you out of your comfort zone.”

**ASHLEY POTTER**

VICE PRESIDENT WEALTH MANAGEMENT,  
MANAGER OF INSTITUTIONAL BUSINESS SUPPORT  
FIRST CITIZENS BANK  
4/1 MBA GRAD CAMPBELL  
CLASS 2010

Often students fall in love with and ultimately choose to accept permanent hire positions in the cities where they interned.



# PLACEMENT

As a Campbell Trust Major, you are exposed to a unique career preparatory experience. You will learn the skill sets necessary to be productive on day one. The Trust Program is distinguished by a single-minded determination on our part to give you every opportunity to be employed upon graduation from Campbell University.

## WHERE DOES IT BEGIN, AND WHAT IS THE PROCESS?

Our placement process actually begins in the Fall Semester of your junior year. As a Campbell Trust Major, the placement process begins with a Resume Writing / Interview Skills Workshop. Members of the Board of Directors of the Trust Education Foundation, Inc., are on campus for an afternoon session designed to prepare the juniors for the interview process. These seasoned professionals have literally hired hundreds, if not thousands, of people over their respective careers. Their insights and guidance are invaluable.

Students meet with the Director of Placement and Career Services for the Business School to set up placement files and submit their resumes for distribution. The Director is the primary point of contact during the interview process and is a great advocate for the students.

Students submit their biographies and pictures for the online placement bulletin. The bulletin can be viewed from the Campbell University website but also from the website of the Trust Education Foundation, Inc., at [trusteducationfoundation.com](http://trusteducationfoundation.com).



"I graduated in 1994 from the Trust and Wealth Management Program and I immediately joined First Citizens. I have spent my entire 20 plus-year career at First Citizens Bank. I started out at the absolute ground level and have slowly, but surely navigated my way up to my current position, which is to lead the Trust business for the bank."

### GENE LEWIS

SENIOR VICE PRESIDENT  
MANAGER OF TRUST DEPARTMENT  
FIRST CITIZENS BANK  
CLASS OF 1994



“The Trust and Wealth Management Program offered an in-depth examination of the legal and practical considerations surrounding the creation and administration of trusts as well as an intense study in investments and economics. Now, as an attorney, I assist clients with estate planning and counsel them on charitable gifting strategies using skills that I originally learned in the Trust and Wealth Management Program. Looking back, I know I would not be where I am today were it not for the guidance and education I received as a student in the Trust and Wealth Management Program.”

**CHRIS HEWITT, JD**

TRUST & ESTATE ATTORNEY  
 WOMBLE BOND DICKINSON (US) LLP  
 CLASS OF 2010

Interviews for 10-week paid summer internships are held on campus with the vast majority of qualified students receiving offers. The internships are with institutions including U.S. Trust / Bank of America, Wells Fargo, SunTrust, JP Morgan, BB&T and First Citizens Bank in cities such as:

- |             |               |               |
|-------------|---------------|---------------|
| RALEIGH     | WINSTON SALEM | BOSTON        |
| CHICAGO     | DALLAS        | PHILADELPHIA  |
| CHARLOTTE   | NEW YORK      | SAN FRANCISCO |
| LOS ANGELES | ATLANTA       | SEATTLE       |

Students choosing to enroll in Campbell’s 4/1 BBA/MBA Program have the opportunity to earn a second internship with the same or a different institution. The overwhelming majority of students completing one or two internships are offered a permanent position during their final

year at Campbell. In fact, some students will have a permanent hire offer even before the beginning of their final year.

As interns, students receive real world, hands-on experience working with the best professionals in the business. Also, when you think about it, an internship is actually a 10-week interview. Throughout the internship, employers will be able to see the technical expertise, work ethic, level of maturity, communication skills and the ability of the student to work as a member of a team of professionals. Our students shine in those areas. Well over 95% of Trust students are placed within one month of graduation, showing that employers appreciate the value of the Campbell Trust education.



Over 95% of the TWM graduates are placed in full-time jobs within one month of graduation provided they are willing to relocate.

# TRUST EDUCATION FOUNDATION

The Trust Education Foundation, Inc. (TEF) was formed

in 1971. Its mission is to support the Trust and Wealth Management

Program offered by Campbell University. The TEF Board of Directors is composed of senior managers from the nation's premier financial institutions. The Foundation sponsors educational programs around the country in its attempt to fulfill its mission.



The Foundation supports the Trust Program by:

- PROVIDING CURRICULUM OVERSIGHT ENSURING STUDENTS ARE EXPOSED TO CUTTING EDGE INSTRUCTION IN THE AREAS OF FIDUCIARY LAW, TAX PLANNING, FINANCIAL PLANNING, INVESTMENT MANAGEMENT, ESTATE PLANNING AND IN TRUST AND ESTATE ADMINISTRATION.
- PROVIDING SCHOLARSHIP AID FOR WORTHY DESERVING STUDENTS ENROLLED IN THE TRUST PROGRAM. OVER 25 SCHOLARSHIPS HAVE BEEN FULLY FUNDED DUE TO THE EFFORTS OF THE FOUNDATION.
- SPREADING THE WORD ABOUT THE CAMPBELL UNIVERSITY TRUST PROGRAM BY INCREASING THE VISIBILITY OF THE PROGRAM AMONG FINANCIAL INSTITUTIONS NATIONWIDE AND ENHANCING THE PLACEMENT OPPORTUNITIES AVAILABLE TO THE GRADUATES.

The flagship program offered by the Foundation is the **TRUST ADVISORS FORUM (TAF)** at Pinehurst. In a typical year approximately 275 senior trust officers from 30 states representing 110 institutions will attend the four-day educational program. The Forum is the nation's foremost conference for trust professionals. More importantly, the leading institutions from across the country actively recruit on campus each year.



"The Trust Education Foundation provides scholarships for students who want to attend Campbell's Trust Program, who may not be able to afford some or all of the tuition. We have a very well-done continuing education program that we provide through the Trust Advisors Forum in Pinehurst every year in February. We draw people from over 100 different organizations from 30 states throughout the United States. These financial services organizations have an opportunity to interview Campbell students for internships or full-time hires while we are there at the program each year."

#### KEVIN WARD

SENIOR VICE PRESIDENT

SENIOR TRUST MANAGER

BB&T

CLASS OF 1986; MBA, CLASS OF 1994

## THE SOUTHEASTERN TRUST SCHOOL (SETS)

founded in 1967 is one of the Trust Education Foundation's educational programs. SETS originated as a program for bank trust officers and retains a strong focus on the trust industry. It also offers value to managers and other employees of investment companies, brokerages, accounting and law firms, retirement plan providers and benefits administrators.

The Trust Advisors Forum in Pinehurst held every year in February is designed to provide all of the continuing education requirements for a Certified Trust And Financial Advisor or CTFA certification.

The Trust Education Foundation's website is a tremendous resource for the industry and affords our graduates an excellent opportunity to network. The Foundation website contains information about:

- THE TRUST PROGRAM
- AN ONLINE PLACEMENT BULLETIN (FEATURING INTERN CANDIDATES AND PERMANENT HIRE CANDIDATES)
- AN OPPORTUNITY FOR THE TRUST ALUMNI TO NETWORK USING LINKEDIN

For more information on the Trust Education Foundation Inc. visit us at [trusteducationfoundation.com](http://trusteducationfoundation.com).





## CAMPBELL TRUST + WEALTH MANAGEMENT



**CAMPBELL**  
UNIVERSITY

Lundy-Fetterman  
School of Business



TRUST EDUCATION  
*Foundation*

For more information about Trust as a career, please contact:

**JIMMY WITHERSPOON**

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For information about the Lundy-Fetterman School of Business,  
visit [campbell.edu/business](http://campbell.edu/business).

For more information about Campbell University Admissions,  
visit [campbell.edu/admissions](http://campbell.edu/admissions) or call 800.334.4111.