



CAMPBELL
UNIVERSITY

Lundy-Fetterman
School of Business

Trust & Wealth Management

2023 – 2024

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

Nick Aderholt

Mark Allen

Michael Anderson

Mason Askew

Ben Beaman

Broc Bidwell

Michael Bowles

Samari Brooks

Warren Brown

Britton Burley

Maddox Capps

Maria Carbajal

Eleanor Creed

Jacob Creswell

Abigail Croom

Isaiah Espinoza

Jason Estrada

Reagan Gee

Megan Harwood

Christian Hunter

Nick Jernigan

Eric Klosterman

Logan Ladue

Bryson Lee

Keagan Leonard

Carter Lewis

Evan Lewis

Peter Liefbrig

Garnet Manley

Steven Mirabile

Grace Newby

Tyra Parker

Zachary Rine

Jackson Shaw

Grant Solomonic

Wade Sullivan

Abigail Tuyo

Savannah Tyndall

Jonothan Whitmore

Jared Williamson

Nick Aderholt



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. Administrative on Campus Housing Scholarship, Campbell Need-Based Scholarship, Faison, James L Memorial Scholarship, Federated Investors Incorporated Trust Scholarship, Sauls, Dr Ernest P. Business scholarship, Scott-Ellis Scholarship. Certifications Acquired: Brian Hamilton Foundation's Stater U Certificate, Microsoft PowerPoint Certificate, Microsoft Word Certificate.

WORK EXPERIENCE

Spangler Restoration Water Technician and Carpentry (May 2022-September 2023). Assisted with water mitigation, biohazard restoration, mold restoration, fire restoration, and residential/multi-family repairs. Worked in partners with fellow coworkers to help mitigate homes that have dealt with disasters by demoing affected drywall, baseboards, flooring, and subflooring. Following the mitigation process I would set up equipment depending on the scope of work. Additionally, worked as a carpenter and assisted in painting, hanging drywall, installing fixtures, replacing duct lines, and plumbing. Jersey Mikes employee (March 2021-August 2021). Created and served a variety of sandwiches while utilizing strong customer service skills. Assisted with prepping food, stocking inventory, making sandwiches, and ringing customers up. Attained managerial skills by implementing new customer service strategies and implementing team meetings for feedback purposes. Offensive Lineman Fundamental Football Coach (September 2020- May 2021). Single-handedly marketed to youth athletes around the greater Charlotte area. Responsible for organizing practice times with parents and participants, setting up drills, critiquing participant's performances, and mentoring participants. WCAA Flag football coach and referee (June 2020-August 2020). Assisted as a head coach, would substitute players during the game, create unique and effective plays, critique performances, talk to parents, and motivate participants to continue their football careers. Additionally, assisted as a referee where I was responsible for calling penalties, keeping score, and recognizing first downs. Inzios Pizza Napoletana Dishwasher (May 2020-December 2020). Assisted in washing and drying dishes as well as prepping ingredients. Student Athlete Weddington High School (June 2018-June 2021). Assisted as a varsity starting full-back and offensive lineman throughout my three years. Attained and enforced team-building skills, motivating teammates, goal goal-creating. Furthermore, helped assist with a (15-1) record and a state championship in 2018 and a (16-0) record in 2019 leading to back-to-back state championship titles.

EXTRACURRICULAR ACTIVITIES

Risk Management officer of the Kappa Alpha Order Fraternity North Carolina Zeta Psi Chapter,
Intramural sports, eBay reselling business, sports card investing.

Mark Allen



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management and Prelaw; Expected Graduation: May 2025; GPA: 4.00. President's List, J. A. Campbell Presidential Scholarship, Awarded Campbell University's Henry E. and Melba Hinson Williams Scholarship, Campbell University's Peggy Lawrence Scholarship, Campbell University's PEP Band Scholarship, Campbell University's Dr. Ernest P. Sauls Business Scholarship, Campbell University's Harry John Guyler Business Scholarship, Campbell University's Southeastern Trust School Trust Management Scholarship, and H. W. Clarke Memorial Scholarship (outside scholarship).

WORK EXPERIENCE

Cramer Mountain Club Restaurant, Host/Server (May 2023- August 2023). Learned how to effectively communicate with the members of the club and accurately get them to their seats in designated sections. Was promoted to server within 2 weeks of starting and developed a close relationship with my fellow employees. As a server, I ensured that the guests were satisfied with their service and got their food in a timely manner. Briar Patch Greenhouse, Laborer (January 2021- September 2022). Ensured that all the plants were put in their rightful place. Had the added responsibility of counting individual plants to ensure that the invoice was correct and ensure we paid the correct amount.

EXTRACURRICULAR ACTIVITIES

Member of the Sound of the Sandhills Marching Band, Campbell University Wind Ensemble, Campbell University Pep Band, Trust Scholars, and Truist Business Scholars. Proficient in Microsoft Office Word and PowerPoint.

Michael Anderson



EDUCATION

Campbell University, B.B.A in Trust and Wealth Management; Expected date of graduation: May 2025; GPA 4.0. Scott-Ellis Transfer Scholarship, Dr. Ernest P. Sauls Business Scholarship, Southeastern Trust School Trust Management Scholarship. Eastern Florida State College, Associate of Arts, Graduated May 2015.

WORK EXPERIENCE

UPS Package Sorter February 2023-Present. Sort up to 1200 packages per hour according to Zip Code or State, Monday through Friday evenings, approximately 20 hours per week. UPS Package Delivery Driver June 2019-June 2022. Safely operated delivery vehicles up to 24'. Organized and delivered packages weighing up to 150 pounds to residential, commercial, and industrial customers, making up to 400 delivery and pickup stops per day. UPS Preload October 2018-June 2019 & June 2022-February 2023. Organized and loaded up to 450 packages

into each of 3 assigned delivery trucks for final mile delivery. H&R Block Seasonal Senior Tax Specialist October 2022-Present. Conduct tax interviews and communicate with clients face-to-face and through virtual tools such as video, phone, chat, and email. Inspired clients to make confident, informed decisions about their finances through completion of individual tax returns. Collaborated with teammates when faced with unfamiliar situations. Planned tax strategies to provide the biggest refund or minimize tax liability for current and future years. Secret Shopper 2019-Present. Analyze various aspects such as customer service, cleanliness, functionality, and accuracy of claims of a wide range of businesses including food and beverage, retail, and other service companies. Document findings through surveys and short reports.

EXTRACURRICULAR ACTIVITIES

Member of Campbell University Trust Fellows, Seasonal Paid Tax Preparer.

Mason Askew



EDUCATION

Campbell University, Master of Business Administration 4+1, B.B.A in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2025. Overall GPA: 3.84. Recipient of scholarships including Scott Ellis Transfer Scholarship (highest award for transfers), Men's Track/Cross Country Scholarship. Peadan's Seafood scholarship. Campbell Dean's list 2022, 2023, University of Oklahoma Dean's list 2022 Spring & 2021 Fall. FAA private pilot ground school certified.

WORK EXPERIENCE

Caldwell Trust Company, Trust summer intern (2023-2023). Assisted in client acquisition, estate closing, portfolio management and investment, acquiring appraisers and real estate agents. Grad Assistant for Campbell Student Union (2023-Current) preparation and room set up and tear down for most Campbell related events held in the union. Whistle Bitches Restaurant,

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

EXTRACURRICULAR ACTIVITIES

NCAA Division I Athlete, Pole Vault. Vice President of the Sigma Phi Chapter of the Kappa Sigma Fraternity. Former Scholarship and fundraising chair. 30+ hours into obtaining a Private Pilot's License. Volunteer for North Central Ballet's 'The Nutcracker' Performance annually (logistics side). Amateur guitar player.

Ben Beaman



EDUCATION

Campbell University, Bachelor of Business Administration in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: December 2024; GPA:3.91. Scott- Ellis Merit Based Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certificate.

WORK EXPERIENCE

Marketing Intern and Environmental Technician at Highlands Environmental Solutions, Inc. (April 2022 - Present). Established and currently managing the creation and posting of social media posts on the company LinkedIn page. Created and posted bi-weekly blog posts on various environmental topics for the company blog. Aided in various project administration work for several different billable projects. Corporate Intern at First Citizens Bank (May 2023 – August 2023). Collaborated with the Institutional Trust, Trust Special and Technical Services, and Trust Operations departments. Gained skills and experience with various fintech software including: CapitalBase, OnBase, TrustDesk, and Envestnet. Conferred with and learned from well over 35+ First Citizens Registered Representatives and Associates regarding trusts, investment strategy and many other financial topics. Food Server at the Garden State Grill (March 2022 – December 2022). Developed extensive soft skills through communication and interactions with customers and coworkers. Expanded on my ability of managing stress while working in a high pressure environment. Campbell University Fitness Ambassador (September 2021 - October 2021) and Supervisor (October 2021 - April 2022). Accomplished various department tasks and objectives through supervising staff and ensuring the safety of gym attendees. Developed leadership skills while acting in a supervisory role. Marketing Intern at Raymond Engineering (April 2020 - August 2021). Developed teamwork skills through working with many members of senior management directly on projects. Spent 250+ hours working with projects and carrying out administrative tasks through popular customer relationship management software Salesforce. Worked on and gained experience with Request for Proposal and Request for Qualification prospects and documents. Cashier at Smashburger (September 2019 - January 2020). Gained experience handling customer complaints and frustrations in an empathetic and professional manner. Managed thousands of dollars of financial transactions through a variety of payment methods.

Broc Bidwell



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management: Expected date of graduation: May 2026; GPA: 3.818. Athletic Scholarship (Basketball), Thomas and Judy Folwell Trust Management Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certification.

WORK EXPERIENCE

Youth Basketball Coach (June 2021-2026). Coached all Campbell University Basketball Schools dealing with children of all ages. Acted as a leader and counselor to help assist the campers in their basketball and living situations. Warehouse Crew (June-August 2021). Assisted in boarding, unloading, maintenance, and scheduling of drop offs and pickups for an international furniture shipping and receiving company. Learned to operate forklift and interacted with team members in keeping the warehouse on

schedule of truck deliveries. West Forsyth High School Basketball Camp Counselor (June 2017-2021). Acted as camp counselor for elementary school campers. Handled daily activities and maintained a full day's schedule of coordinating food, pick up and drop off, and basketball.

EXTRACURRICULAR ACTIVITIES

NCAA Division 1 Men's Basketball, Omicron Delta Kappa Honor Society

Michael Bowles



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management; Expected date of graduation December 2024; GPA: 3.157, Scott-Ellis Merit Scholarship

WORK EXPERIENCE

Campbell University Student Athlete (August 2020-Present). I've played football at Campbell University for the past 3 years as a long snapper. Intern at Bowles Construction (December 2020- August 2023). I worked for Bowles Construction while I was home from school in Augusta Georgia. I did a variety of different jobs such as a carpenter's helper, day laborer, learned how to write estimates, and learned how to handle payroll. Groundskeeper at Augusta National (Masters tournament 2018, 2019). I worked on the course during the tournament on the litter control team. My job was to friendly interact with the patrons while changing out trash bags near and on tee boxes.

EXTRACURRICULAR ACTIVITIES

Campbell University Football team, S.A.A.C. (Student Athlete Advisory Committee) representative, and the Ducks Unlimited Camel Chapter

Samari Brooks



EDUCATION

Campbell University, B.B.A in trust and Wealth Management. Expected date of graduation: May 2024. Scott Ellis Merit Scholarship, Administrative Scholarship, Strickland insurance group Scholarship, Roy L Marshall scholarship, Campbell university football scholarship.

WORK EXPERIENCE

Campbell University Student-Athlete (August 2020–present) Modern Woodmen Financial Advisor Internship I learned how to sell myself and the company, and I also learned how to manage money. (Summer 2022). In game operations for Campbell University and marketing, I help promote ticket sales and events for the teams. (October 2021–present), library assistant for Campbell University, also worked for Oxford County Library. I also coach little league football and volunteer for camps (June 2022 to September 2022). Work for Amazon and Walmart. From April 2021 to June 2023, I worked for a non-profit program

in Durham, North Carolina, to help fight violence. I also help my uncle around his shop and do landscaping. I also helped volunteer at my mother's job (assisted living at home), where I met some important people in my life.

EXTRACURRICULAR ACTIVITIES

Campbell University Football Player, the member of the black student association for Campbell university, Member of the basketball team for intermural sports, I do community service for multiple school. Promote business like Pb fit and Big C waffles in Durham North Carolina.

Warren Brown



EDUCATION

Campbell University, Master of Business Administration (4+1 Program), B.B.A in Trust and Wealth Management Pre-Law, Minor in Financial Planning: Expected date of graduation: May 2025; GPA; 3.184. Dean's List, Administrative On Campus Housing Scholarship, Presidential Scholarship, Peggy R. Lawrence Scholarship (2022-23), Women's Basketball Scholarship (2022-23), North Carolina Need Based Scholarship, Wells Fargo Undergraduate Trust and Wealth Management

WORK EXPERIENCE

Wells Fargo, Philanthropic Services, Summer Intern, Winston Salem, North Carolina: June 2023- August 2023; completed administrative account reviews for the months of June, July, August, and September; keyed in TMM overdrafts with; participated in calls/meetings with the Grants/Scholarships team; updated progress reports and grant applications with the Grants/Scholarships team;

learned to use SEI, Trust Gateway, Trust ImageView, and Filenet

EXTRACURRICULAR ACTIVITIES

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

Britton Burley



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning, Expected date of graduation: May 2025; GPA: 3.958. 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, The Willis and Marguerite Gupton Scholarship

WORK EXPERIENCE

Wells Fargo, Wealth and Investment Management Intern Analyst, Winston Salem, NC, June 2023 – August 2023. Completed Administrative Account Reviews, in order to ensure that accounts were up to date and in compliance. Worked to resolve open items that arose from the Administrative Account Reviews. Completed two

different investment projects, which involved checking accounts for changes in circumstances. Completed a fees project that involved collecting information on fees for different accounts. Reviewed numerous boxes of files to ensure important documents were in the correct place. Completed five synoptic records, which involved gathering important data for the tax team. Gained knowledge about the field, through training from the permanent hires. 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. Collaborated with other volunteers to ensure that the job got done in a safe and timely manner. Volunteer Income Tax Assistance, Volunteer Tax Preparer, Buies Creek, NC, (January 2023 – April 2023). Completed accurate tax returns for individual who needed assistance. Communicated with taxpayers, to ensure that they understood their tax situation. 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.

EXTRACURRICULAR ACTIVITIES

Campbell Intramural Sports, Camel Ducks Unlimited Chapter, Kappa Alpha Order Zeta Psi Chapter (Number II – Vice President); Microsoft Office Proficiency, Excel, Word, PowerPoint.

Maddox Capps



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management. Expected date of graduation: May 2025; GPA: 3.698. Presidential Honor Roll, Dean's List, Bank of America School of Business Trust Scholarship. Keith, Thomas Joseph & Anne Bell Business Scholarship.

WORK EXPERIENCE

Independent Contractor of Capps Painting & Services (June 2019-Present). Painted interior and exterior homes, stained decks and docks, pressure washed homes, and gutter installation/cleaning. Assess contracts and agreements with the clients and bookkeep the monetary revenues and expenses of individual jobs. Update clients on current and future stages of job. Operated the project management of two employees and assisted them with the job. Upon completion, the premises are thoroughly cleaned, and any other clients needs are fulfilled. A variety of social media accounts such as Facebook and Nextdoor

are used to network and market. eBay Account Manager (July 2023- Present). Managed eBay profile where I sell clients items. Research market value of products to be sold and receive selling price approval from the owner of the product. Once products are listed, I interacted with potential buyers and negotiate prices upon the owners approval, update clients of sold items, and ship items out to buyers within mandatory shipping period.

EXTRACURRICULAR ACTIVITIES

Campbell University Basketball Manager, Intramural sports, Fit-Fest powerlifting competition, Cars and Coffee (Car show), Guitar player.

Maria Carbajal



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected Graduation Date: Spring 2024. Master of Business Administration (proposed applicant). 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, Wells Fargo Undergraduate Trust and Wealth Management. North Carolina Notary Public Certification August 2023.

WORK EXPERIENCE

State Employees Credit Union, Peak Time Teller, (Benson, NC) July 2023 to Present. Educate members on their available services and others that can be provide by the branch. Key all required transactions into the MARGO system and balance drawer with accuracy, balance vault, ATM, TCD, and CoinStar sorter, handle drive thru as needed; keep daily and monthly reports such as vault control returned checks, Visa gift card, forgeries, and coin sorter; Assist members over the phone or in person with account problems, checking reconciliation, or errors in transactions; File paperwork, scan into Image System, and other administrative duties as needed. New Vision Logging, Bookkeeper, (Newton Grove, NC) June 2021 to Present. Maintain financial data, controlled subsidiary accounts by verifying, allocating, and posting transactions, outlined and updated account summaries, charted historical records by filing documents and receipts. Food Lion, Office Assistant, (Lillington, NC; Dunn, NC; Newton Grove, NC) August 2020 to Present. 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. Han Dee Hugo's #8, Cashier, (Clinton, NC) April 2021 to September 2021. 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. Corner Cuke Market, Accounting Specialist, (Spiveys Corner, NC) May 2019 to May 2021. 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. Bilingual English/Spanish

EXTRACURRICULAR ACTIVITIES

Campbell University Winter Guard 2023 (AIA South Championships Independent A 3rd Place Winner), Campbell University's Sound of the Sandhills Color Guard (2022-2023), VITA/TCE Volunteer Tax Preparer (2022), Campbell University Student Accounting Society (2021-2022), Episcopal Farmworker Ministry Food Bank volunteer.

Eleanor Creed



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2025; GPA: 3.414. Scott-Ellis Academic Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certificate; Truist Emerging Leaders Certification.

WORK EXPERIENCE

Advocacy Trust Trust Intern (May- August 2023). Assisted in the administration of trust accounts by sending distributions, completing administrative reviews, ratification requests, cash flow analysis preparation forms, unique asset reviews, welcome kits, market value updates for trust-owned assets, setting up remittance blocks, and more. Completed a variety of projects dealing with data compilation and trust-owned real estate. Listened in on client and vendor calls, attended meetings, and learned

from employees across The Forge Companies. Babysitter, Nanny, Pet Sitter, House Sitter (January 2017- May 2023). Responsible for organizing daily schedules and controlling and engaging in activities with children and/or pets. Effectively single-handedly supervised group activities with up to 15 children ages 3mo-13y. Administered daily medications to both children and pets and ensured the safety of homes. 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. 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

Alpha Delta Pi Sorority Iota Beta Chapter; Director of Philanthropy December 2022-Present, Leadership Engagement Specialist December 2022-Present; Phi Eta Sigma National Honor Society; Member, Campbell University Rotaract Club; Member

Jacob Creswell



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management. Expected date of graduation: December 2024; GPA: 3.696. President's List, Scott-Ellis Scholarship, Truist Business Scholars Program, Kess, Sidney Scholarship, Sauls, Dr. Ernest P. Business Scholarship, Administrative on Campus Housing Scholarship, Paschal Mary Scholarship, Barber, Joseph W & Dorothy Hicks Business Scholarship. Certifications Acquired: Truist Emerging Leaders Certification, Brian Hamilton Foundation's Starter U Certificate.

WORK EXPERIENCE

Trust Intern for Cumberland Trust Company (May 2023-August 2023). Assisted Trust Officers in many departments including the Personal Trust, Estates, Special Needs Trust, and Special Assets departments. Completed abstracts for new accounts. Helped organize the company vault. Called charities to gather W-9s for estate

distributions. Prepared Excel sheets to help organize the evidence of insurance for real estate assets. Fixed interested party discrepancies in all personal trust accounts. Listened to client calls. Uploaded and organized documents for ninety-six special needs accounts on the Sales Force software. Attended weekly internal compliance committee calls. Wiggins Memorial Library Circulation Materials Staff (February 2022- May 2023). Assisted patrons with gathering materials for research, finding books, and using manipulative materials. Created monthly displays for the library. Memorized the Library of Congress system for library organization. Poppyseed Market Waiter, Host, and Front Kitchen Staff (August 2020-August 2022). Provided efficient and dynamic organization of waiters and patrons. Resolved problems with discontented customers while maintaining a hospitable attitude. Ensured the daily safe wrapping and packaging of food for storage. Took inventory of foods. Assisted in the setup and breakdown of the restaurant including food, furniture, ovens, and more. Took takeout orders over the phone and ensured pickup orders were packaged and delivered correctly. Aided the Catering Manager with delivery of catering items to customers. Cleaned parts of the kitchen and the dining area. Aided the dishwashers with their duties.

EXTRACURRICULAR ACTIVITIES

Fiduciary Investment Fund; Macro-Forecasting Committee Chair, Truist Business Scholars; Member, Grace Community Church; Member, Fellowship of Christian Athletes; President, Student Government Association; Representative, Club Baseball; Infielder.

Abigail Croom



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 2026 GPA: 3.624 Dean's List; Scott Ellis Merit Scholarship; Lettie Pate Whitehead Foundation Scholarship; Dr. Ernest P. Sauls Business Scholarship; Wells Fargo Undergraduate Trust and Wealth Management Scholarship; North Carolina Baptist Foundation Luther H. Butler Scholarship; Rotary Club of Burgaw Scholarship Endowment.

WORK EXPERIENCE

Brown Dog Coffee Company Barista (December 2020-Present). Prepared specialized drinks for customers, coordinated training for new hires, and supervised shifts of up to five baristas at a time as a team leader. Improved customer experience by assisting the manager in creating marketable and creative food and drink recipes. Efficiently

processed cash, credit, and check transactions using a point-of-sale system. Micro-roasted coffee beans for nationwide subscriptions and two wholesale stores on a bi-weekly basis. Created handmade signage for in-store use and outside events. Opened and closed the store, performing tasks such as cleaning, food and drink preparation for the next shift, and inventory logging. Galot Motorsports (September 2022-Present). Facilitated merchandise sales with customers using both cash and card transactions. Folded shirts and organized them based upon size, then organized all merchandise by category. Maintained inventory records and performed opening and closing operations independently. Elementary School Tutor (Summer 2020-Spring 2021). Assisted a third grader in adjusting to new online programming for virtual school sessions. Set goals for the student's individual learning needs and integrated entertaining techniques for them to retain information.

EXTRACURRICULAR ACTIVITIES

Class Representative for Campbell University Student Government Association (Fall 2022-Present); Chair of Design and Co-Chair of Service for the Alpha Xi Chapter of Sigma Alpha Omega National Christian Sorority (Present); Member of the Alpha Xi Chapter of Sigma Alpha Omega Christian Sorority (Spring 2023-Present); Student Representative for Campbell University's Registry and Calendar Committee (Present); Forest Hills Baptist Church Choir Member (2017-Present); Proficient in Microsoft Word, Microsoft Excel, and Microsoft PowerPoint.

Isaiah Espinoza



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management. Expected date of graduation: May 2026. Scott Ellis Merit Scholarship, Administrative On-Campus Housing Scholarship.

WORK EXPERIENCE

Campbell University, Campus Recreation, Lillington, NC. (August 2022-Present) As a sports official for intramural sports, I ensured the maintenance of fair play, player safety, and game flow. Practiced swift, accurate, and time-sensitive decisions, safeguarded the integrity of all sports by enforcing rules and regulations, mediating disputes, and facilitated a level playing field all while creating an enjoyable experience for campus peers. El Parral, waiter/server, Eden, NC (May 2019- July 2021) Exhibited exemplary customer service, order management, and an impeccable clean setting. Adapted to flexibility in meeting

customers' needs and gracefully resolving issues. Honed the art of multitasking efficiently and consistently delivering top-notch service, leading to positive reviews and repeat business. I had the privilege of mentoring inexperienced staff, helping develop a skilled service team, and contributing to the restaurant's overall success.

EXTRACURRICULAR ACTIVITIES

Microsoft Office Proficiency, Word, PowerPoint, Excel, OneDrive, Outlook. Certified in Adobe Photoshop and Illustrator. Proficient in Google Drive. Vice President and Captain of Men's Club Soccer for Campbell University. Intramural Sports. Fluent in Spanish.

Jason Estrada



EDUCATION

Campbell University, B.B.A in Trust and Wealth Management Pre-Law, Minor in Financial Planning. Expected date of graduation: December 24; GPA 3.189. Wells Fargo Trust and Wealth Scholarship, Southern Western Scholarship, Campbell Student Body Scholarship, North Carolina Need Based Scholarship, Surles L. Stuart Business Undergraduate Scholarship, Campbell University Promise Scholarship, Pell Scholarship, North Carolina Need Based Scholarship. North Carolina Academic Scholarship.

WORK EXPERIENCE

Adable Mentorship (October 2022 - Present): Since October 2022, I've been dedicated to establishing and nurturing Adable Mentorship, a program designed to guide and support young adults in their entrepreneurial journey. Our mission is to provide them with comprehensive, step-by-step guidance. In collaboration with a diverse team of professionals, including legal experts, CPA firms, financial advisors, marketing specialists, and seasoned entrepreneurs from the local community, we aim to empower our mentees to succeed. Our legal team plays a crucial role by expediting deal-making processes, ensuring compliance, and enhancing the overall quality and consistency of our mentees' business contracts. Meanwhile, our CPA experts assist mentees with essential financial tasks such as bookkeeping, the preparation of vital financial documents (e.g., tax forms and profit-and-loss statements), financial planning, and tax filing, among other financial responsibilities. Our dedicated financial advisors work closely with our mentees to assess the viability of their business models and formulate effective strategies and timelines for achieving profitability. The marketing team, often referred to as the "Closer Team," is instrumental in promoting our mentees' organizations and their products and services. They develop strategies to boost sales and revenue, always ensuring alignment with customer needs and market demand. Our sales professionals provide valuable training to the staff of mentee organizations, teaching essential skills such as reading basic body language and building confidence in communication with potential customers. Towards the end of our program, we arrange one-on-one, in-person interactions between our mentees and established local companies, facilitating opportunities for valuable insights and knowledge sharing within their respective fields. Estrada Stone Co. (May 2022 - Present): Estrada Stone Co. is a family-owned business that specializes in remodeling bathrooms and kitchens. Our comprehensive range of services includes marble installations, granite installations, quartz installations, backsplash remodeling, sink design, custom coffee table crafting, custom cutting board production, custom mailbox creation, and the crafting of wine racks made from marble. We take pride in our commitment to excellence and craftsmanship in every project we undertake. Adidas Store (March 2019-August 2020). I served as a Merchandising/Inventory Associate. My role at Adidas placed a significant emphasis on delivering exceptional customer service, allowing

me to hone my communication skills while interacting with a diverse range of individuals. In addition to my core responsibilities, I frequently stepped in to assist as a cashier whenever needed, ensuring a seamless shopping experience for our customers. Furthermore, I was entrusted with the vital tasks of executing weekly price changes and performing various merchandising duties to maintain the store's appealing and organized presentation.

EXTRACURRICULAR ACTIVITIES

I have several hobbies that bring me joy, including weightlifting, running marathons, traveling, snowboarding, and, most importantly, spending quality time with my loved ones.

Reagan Gee



EDUCATION

Campbell University, Master of Business Administration
B.B.A in Trust and Wealth Management. Expected date of graduation: May 2025; cumulative GPA 3.619. Dean's List, Scott Ellis Transfer Scholarship, Administrative on Campus Housing Scholarship, Benjamin M. Hawkins Trust Scholarship.

WORK EXPERIENCE

Internship with Wells Fargo in Long Beach, CA (June-August, 2023). Shadowed and learned the daily tasks of a Trust Officer. Helped provide administrative assistance to Trust Officers and worked on multiple projects alongside them. 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.

Megan Harwood



EDUCATION

Campbell University, Bachelor of Business Administration in Trust and Wealth Management Pre-Law, Minor in Financial Planning: Expected date of graduation: May 2024; GPA: 3.470. Scott-Ellis Merit Scholarship, Tuton, Sue Worthington & Garland Wayne Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, Jessica N. White Endowed Scholarship.

WORK EXPERIENCE

Young Men's Christian Association After School Site Coordinator (August 2022-Present). Planned daily schedule of events and activities. Managed and developed a staff of 4 members while providing coaching and mentorship, as well as conducting monthly performance evaluations. Worked with superiors to maintain a safe and inviting environment. Responsible for all children and staff as the first responder. First Presbyterian Church of

Dunn Nursery Coordinator (August 2021-Present). Organized all aspects of the nursery for ease of accessibility. Worked closely with parents to understand their child's needs and concerns. Worked with parents to set clear expectations and plans. Gained strong expertise in client relations with frequent phone calls and in-person communication. YMCA Summer Camp Office Manager (June 2022-August 2023). Provided support to directors, organizing files and legal documents for 200 campers. Completing 4-5 disciplinary forms a day and handling all purchase receipts. Served as a resource for 30 staff members, by maintaining proper headcounts, and being approachable to answer any questions and give guidance. Was the main office receptionist, including answering 50+ phone calls a day, replying to general inquiries and greeting 200-300 parents and campers upon arrival and departure each day to ensure their needs were met. YMCA Summer Camp Counselor (June 2020-August 2021). Responsible for maintaining the safety and wellbeing of 12 campers through scheduled activities. Helping campers develop by encouraging the YMCA's 6-character traits; caring, respect, responsibility, honesty, faith in God, and spirit, with incentives throughout each day.

EXTRACURRICULAR ACTIVITIES

Member, Alpha Delta Pi Sorority Iota Beta Chapter: Director of New Member Experience, Sisterhood Specialist; Intramural Sports.

Christian Hunter



EDUCATION

Campbell University, Trust and wealth management major, expected graduation date May 2025, dean's list, Martin, Carlton and Lynell business scholarship. Academic merit scholarship

WORK EXPERIENCE

I am a member (volunteer) of the production team for Tabernacle Baptist Church. I was in charge of lighting, I created programs for different scenes for live and recorded events held in our Worship Center. Being able to work in this area has allowed me to receive a few scholarships from the education dept at my church for college. (April 2015- June 2021) I had a summer internship with the

largest manufacturer of commercial trucks in North America. I assembled semi-trucks; I specialized in installing the brake system and hoses, producing at least 64 trucks a day. I trained new employees to assemble the braking systems. After being offered to come back for another summer I was tasked with assisting the HR department with finding solutions for the new hires that may be struggling. (May 2022 – August 2022, May 2023 – August 2023) I hold a work study position at Campbell University. To go along with playing football, I currently hold a work-study position with the Strength and Conditioning program as well as the Equipment Staff. I upload data and various records into spreadsheets. I also help perform various tasks within both programs, for example, assembling new workout equipment, sorting uniforms and gear, and recording the merchandise inventory. August 2022- Present

EXTRACURRICULAR ACTIVITIES

Extracurriculars- Football Student- Athlete, Campbell Uplift member, Campbell Black Student Association member

Nick Jernigan



EDUCATION

Campbell University, M.B.A. in Master of Business Administration, 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, Tasked with handling the money of the company, observing what items were selling out the most and the ones selling the least, using quick critical thinking to solve problems, exemplifying 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 excellent 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/Pro Shop assistant, Keep members satisfied, cleaning carts and putting them out for customers, checking in people in the pro shop making all the customers are going off the right tee box at the appropriate time, in charge of making the schedule for all the employees at the golf course, tasked with having to contact any new hire we may have and help train them to our procedures. State Employees Credit Union (SECU), Raleigh, NC. As a trust intern, responsible for reviewing planning worksheets to see if a member's will/trust plan was eligible for our program, and if so booked them with an attorney, reviewed wills and trusts to see if there were any mistakes or left openings for contest or questioning. BADM-100, Campbell University, NC. As a Peer Mentor, tasked with leading and mentoring a small group of freshman business students over their first semester of college. Reviewing and grading the projects they are tasked with, and critiquing their projects to benefit them for the future.

EXTRACURRICULAR ACTIVITIES

Campbell University Investment Club, Kappa Alpha Order Zeta Psi Chapter (Number IV and V), Campbell Fraternity Council (Vice President of Recruitment) Campbell University Intermural Sports, Campbell University Club Tennis, Camel Ducks Unlimited Chapter, Microsoft Office Proficiency, Word, PowerPoint.

Eric Klosterman



EDUCATION

Campbell University, Master of Business Administration (proposed applicant). B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected graduation date: December 2025; Major GPA: 4.0. Dean's List, Scott Ellis Transfer Scholarship, Lundy-Fetterman School of Business Faculty Endowed Scholarship, Gatton T. Harry Trust Scholarship.

WORK EXPERIENCE

Summer Intern, RBC Trust Delaware (May 2023 - July 2023). Partnered with a Trust Administrative Officer to correspond with clients, accomplish daily tasks, and analyze client data and trust agreements. Provided input on discretionary disbursement requests and successfully completed multiple projects throughout the summer. Server, The Chelsea Restaurant (May 2018 - December 2022) Worked as a dishwasher, busboy, cook, bar back, and server throughout my four and a half years at The

Chelsea. Learned excellent communication skills and customer service in the high-stress, fast-paced environment of an upscale restaurant. Served as the restaurant's utility man, working in any situation or position on short notice.

EXTRACURRICULAR ACTIVITIES

Campbell University Fiduciary Investment Fund, Club Spikeball, Leader at a Local Church Youth Group, Intramural Softball, Basketball, and Soccer.

Logan Ladue



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A in Trust and Wealth Management, Expected date of graduation: May 2026. Need Based Scholarship, Scott Ellis Transfer Scholarship, Admin VP Scholarship, Levine Scholarship.

Central Piedmont Community College, A.A. in Business, Date of graduation: July 2023; GPA: 3.82, President's List Fall 2022, Dean's List Spring 2023.

Purdue University, B.S. in Computer Graphics Technology, DNF. North Carolina

WORK EXPERIENCE

Owner and Head Trainer of A Knight's K9 Dog Training LLC (Dec 2019 – Aug 2023) Waxhaw, NC. Owned and operated a successful dog training business that focused on providing obedience training and boarding services to over 300 clients in the suburbs of Charlotte. Conducted both in-person and digital sales, as well as attended many unpaid visits and interviews in hopes of generating additional sales. Managed an online presence in the form of: SEO utilization, lead-generating platforms (Rover, Wag, Bark, etc.), social media platforms, and creating a company website. Performed the necessary technical skills to adapt and train for each client's focused needs, ranging from standard obedience and more advanced behavioral modification to service dog training, personal protection, and controlled aggression. Worked with and cared for between 5-25 dogs per day. Helped train Police K9 and MWD candidates. Primarily focused the business on building relationships with customers and frequently maintaining long-term communication with clients to better promote customer satisfaction and recommendations. Communicated and taught clients various training strategies and methodologies in order to lead them to training success in the future. Kennel Technician and Dog Trainer for All Dogs Unleashed NC LLC (May 2019 – Dec 2019) Charlotte, NC. As Kennel Technician: Keyholder. Performed opening and closing duties that included the proper care and nourishment of all animals staying within the facility. Worked with and trained numerous co-workers in order to better accomplish tasks and understand teamwork. Completed all general upkeep duties, which included maintenance tasks, facility sanitization, and basic equipment construction. As Dog Trainer: Completed a 3-month unpaid apprenticeship. Trained all dogs currently enrolled in the boarding programs, which was often between 35-40 dogs per day. Represented the company while greeting customers at the front desk, handling transactions, and during the transportation of dogs back to their homes. Formulated and conducted presentation-style lessons designed to ensure customers' long-term success upon their dogs' return.

EXTRACURRICULAR ACTIVITIES

YoungLife Union County; Volunteer Leader for Parkwood High School, JASD PSA Club; Team Member, Competitor, Decoy/Helper, Triangle Fraternity (Beta Chapter); Philanthropy Chair, Social Chair, Annual Purdue Science Fair; Volunteer Peacekeeper, Taekwondo; Black Belt, Brazilian Jiu-Jitsu; White Belt, Archery; Hobbyist, Powerlifting; Hobbyist.

Bryson Lee



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; Cumulative GPA: 3.810. President's List, Dean's List, Scott Ellis Merit Based Scholarship, Dr. Ernest P. Sauls Business Scholarship, Marvin Drake Johnson Trust Management Scholarship, Mary Paschal Trust Management Scholarship, First Citizens Bank Scholarship (outside scholarship)

WORK EXPERIENCE

Rose & Graham Funeral Home, Funeral Assistant, September 28, 2021 - Present, Serving the areas of Benson, Four Oaks, and Coats, North Carolina. Assisted Funeral Service Licensees with day-to-day operations including removal of decedents from residences and medical facilities, preparation of decedents, assisting Funeral Directors with funeral services, and taking night call.

Provided emotional support to families after a loved one has passed. Created and modified funeral service videos to be posted to the company's YouTube page. Created playlists and background multimedia for funeral services. Variety of delivery duties. Revamped obituaries to be sent to local news publications. General cleaning and maintenance, such as taking down tents, and other equipment after a funeral service. Greeting clients and attendees with compassion while also giving directions and instructions related to the funeral service. Organized parking and processional line for a smooth entry/exit with efficiency. Developed proficiency in dealing with emotionally distressed people.

EXTRACURRICULAR ACTIVITIES

Member of Campbell University Trust Fellows, Camel Ducks Unlimited Chapter, Golfing, Volunteer activities coordinator at Banner Chapel Advent Christian Church, Campbell University Lundy-Fetterman School of Business Peer Mentor

Keagan Leonard



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 2025; GPA 3.369. Scott-Ellis Scholarship. Certifications Acquired: Brian Hamilton Foundation's Start U Certificate

WORK EXPERIENCE

Wait Staff/Line Cook of Abbey Road Tavern and Grill Fuquay (April 2018- Present). Associated with customer satisfaction, customer service, and the excellence of food quality and dining experience. Worked in unison with three or four other individuals to help a full restaurant of guests anywhere from 5-8 hours at a time. Focused on building positive relationships with customers, as well as with the restaurant to ensure long-lasting positive effects that will keep customers coming back. Associated with hours in the kitchen preparing and prepping food. Focused

on following safety and health protocols as well as preparing food that would uphold the standards we had set. Working with 5-6 other cooks while creating meals that are enjoyable, don't violate customers' dietary restrictions, and exceed all of their expectations. Cary Auto Detailing (Entrepreneurship, June 2019-April 2020) Partnership associated with traveling around the triangle area washing cars. Offering upscale packages which focused on customer service as well as satisfaction to create repeat business and get a good first impression.

EXTRACURRICULAR ACTIVITIES

Phi Delta Theta Fraternity NC Zeta Chapter; Recruitment Chairman; Intramural Sports; Recreating League/ Travel Baseball Assistant Coach, Philanthropic Supporter of the Live Like Lou foundation.

Carter Lewis



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Expected date of graduation: May 2025, GPA: 3.9, Wayne Community College, Associate in Arts, 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, Eastern North Carolina Firefighters' Association Scholarship

WORK EXPERIENCE

Campbell University, Community Assistant, Lillington, NC. (August 2022-Present) Assisted students with facilities issues, lock-outs, and the safety and security of residence halls. Created a sense of community in the residence halls through engaging events. Wells Fargo, Personal Trust Intern Analyst, Winston-Salem, NC. (June 2023-August 2023) Oversaw trust accounts (irrevocable, revocable, guardianship) and agency accounts with up to \$50 million market values alongside senior trust officers and risk management. Performed administrative account reviews, trust and agency closings, discretionary power exercises, beneficiary additions, and closed most of the team's risk management open items. First Citizens BancShares Inc., Summer Float Sales and 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. Promoted from a cashier role to a drive-thru order processing position. Recognized as employee of the week in March 2020.

EXTRACURRICULAR ACTIVITIES

FBLA Vice President of Recruitment, CU Fiduciary Fund Manager, Future Business Leaders of America Chapter (FBLA), IPHC YouthQuest Short Sermon Alpha National Winner, FBLA National 3rd place Macroeconomics, Impromptu Speaking Finalist, Student Government Senior Class Representative, Campbell University First-year Peer Mentor, Club Tennis, Gold Rock Marketing Futures Education Certification, Proficient with Microsoft Office.

Evan Lewis



EDUCATION

Campbell University, Master of Business Administration Candidate, B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2025; GPA: 3.8. President's List, Dean's List, Scholar Athlete, Scott-Ellis Merit Scholarship, Administrative on Campus Housing Scholarship, First Citizens Bank Scholarship, James A. Campbell Scholarship, Dr. Ernest Paskel Sauls Business Scholarship, Mary Paschal Trust Scholarship, Campbell University Cheer Scholarship.

WORK EXPERIENCE

Wells Fargo, Personal Trust Intern Analyst (June 2023 – August 2023). Developed proficiency in SEI, Imageview, Filenet and TMT. Assisted trust officers with tasks related to accounts such as administrative account reviews, distribution requests, overdrafts and account closures. 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. Campbell University Student-Athlete (August 2022-Present). Merchants Distributors Inc. Warehouse selector, Hickory NC (May 2021- January 2023). As a warehouse selector I worked on a team in a production based 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 of their children.

EXTRACURRICULAR ACTIVITIES

Campbell University Cheerleading, Recruitment Chairman and Warden of the Executive Committee 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



EDUCATION

Campbell University, Master of Business Administration, 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. Game Day Site Coordinator, Wake Futbol Club, Holly Springs, NC. September 2022 – Present. As a Game Day Site Coordinator, I effectively and efficiently manage the proper set up and break down procedures for the soccer fields along with the proper use and care of videography equipment for game recordings. 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, Campbell University Fiduciary Investment Fund. Microsoft Office Proficiency, Word, PowerPoint.

Garnet Manley



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning; 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. Truist, Fiduciary Intern for Trust Administration, Lynchburg, VA; June 2023 – August 2023. Assisted the Trust Administration team at Truist in a remote intern role. Created MDA Discretionary forms for personal trust requests for discretionary funds. Reviewed trust documents to decide approval or disapproval of discretionary

funds. Created and sent letters for Automated Clearing House approval for Truist trust accounts. Hand-processed business processes for AdvisorDesktop and iWork software applications. 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 and Mentor for Jefferson Forest High School, Campbell Student Athletic Advisory Committee (SAAC) Representative for International Student Athlete Support, Truist Emerging Leaders Certification, Microsoft Office Proficiency; Word, Excel, PowerPoint.

Steven Mirabile



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, expected date of graduation: May 2025; GPA: 3.625, Fetterman, Lewis M & Annabelle L Business #1 Scholarship, Lawrence, Peggy R Scholarship, Truist Business Scholars Program Scholarship, Administrative on Campus Housing Scholarship, Campbell Football, Campbell University Student Athlete Advisory Committee

WORK EXPERIENCE

Campbell University Student-Athlete (July 2022- Present). Trust Education Foundation Trust Advisor's Institute, Student Assistant (Summer 2023). Assisted instructors and students in the execution and maintenance of the ATFA certification course, and attended all classes given by these instructors. Nassau County Police Activity League, New Hyde Park, NY. Event Coordinator and Camp Counselor (2019-Present). At the PAL, I had many duties such as

instruct, teach, observe, and supervise children playing various sporting events. I also had to serve as an office representative to plan and create ideas alongside my colleagues, parents and/or guardians. Assistant League Director for Twenty4 Lacrosse Club based out of Garden City, NY (Fall 2020). With Twenty4 Lacrosse, I supervised all operations such as office assignments, event set up, scheduling, and maintaining a safe environment for spectators and players. I also have work experience in carpentry and kitchen design as well as antiquing.

EXTRACURRICULAR ACTIVITIES

Campbell University Football, Truist Business scholar, Campbell University Student Athlete Advisory Committee, Peer Mentorship program for Campbell's Business Schools Freshmen Seminar.

Grace Newby



EDUCATION

Campbell University, B.B.A in Trust and Wealth Management in Pre-Law, Minors in Financial Planning and Sport Management; Expected date of graduation: May 2025; GPA: 3.319. Dean's List Fall 2021, Scott Ellis Merit Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, Dr. Ernest Paskel Sauls Business Scholarship, Lettie Pate Foundation Scholarship.

WORK EXPERIENCE

Student-Manager for Campbell's Division I Men's Basketball Team (September 2022 - Present). Managerial work includes, setting up and breaking down practices and workouts. Assisted in the arrival and departure of student-athletes for home games, away games, and practices/workouts. During summer camp, worked the camp bank, which entailed of keeping up with over a hundred participants and each of their accounts while also keeping inventory of the items sold and not sold. Worked

within a team of student-managers, the Director of Operations and Director of Player Development to ensure safe transfer of the athletic gear and equipment during practices, workouts, and games. Student Sales Associate for Campbell Athletics (September 2022 – April 2023). Handled and counted money before and after each sales day. Worked different sports teams on game day (i.e., football, women's basketball, and baseball). Start Teams Intern (November 2022 – May 2023). Worked with Author Nicole Fenner on marketing and blogging for her company Sister Girl Publishing. Working with April Kelly for her business Sure! Co. Sent emails and messages for her events.

EXTRACURRICULAR ACTIVITIES

Delta Phi Epsilon Sorority Gamma Upsilon Chapter; Vice President of Equity and Belonging; Campbell University's Campus Activities Board; Diversity and Culture Chairmen;

Tyra Parker



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management Pre- Law Minor in Financial Planning. Expected date of graduation: May 2025 ; GPA 3.318. Women's Softball T&F Scholarship, Campbell Need Based Grant, Bank of America school of Business Trust Scholarship, Scarborough, Todd R & Elva Trust Scholarship, Rowland, Gordon B Trust Scholarship, Scott Ellis Merit Scholarship.

WORK EXPERIENCE

Hostess & Waitress, Big City Wings, Houston, TX May 2023 – Aug 2023. Utilized the Point Of Sale (POS) to process customer orders, complete payment transactions, and issue receipts. Provided customer service, including greeting guests in a friendly manner as they arrive, receiving orders, and accommodating the needs and requests of 100+ customers daily. Utilized in-depth knowledge of appropriate

food handling techniques, such as proper soup temperatures and equipment cleaning procedures to ensure a sanitary work environment. Provided training to two newly hired waiters/waitresses to acquaint them with the restaurant's operational procedures, routines, policies, standards, and best practices. Asst. Softball Coach, Blazed United, Houston, TX May 2023 – Aug 2021 Proficiently led practices and coached 12 player softball team of ages 13-14. Helped players to improve their batting, pitching and fielding skills. Created team strategies to raise the overall success rate of team resulting in two tournament wins out of five appearances within the season. Scheduled regular social activities with teams that enhanced cooperation between members and improving dynamic among teammates. Advised both players and parents on proper nutrition habits as well as tips for injury prevention; reducing number of injuries during games/practices .

EXTRACURRICULAR ACTIVITIES

Campbell University Softball Player ; Campbell university's Black Student-Athlete Association , Secretary

Zachary Rine



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected date graduation: May 2025; GPA: 3.211. Scott-Ellis Scholarship; Wiggins, Norman Adrian & Mildred Harmon Scholarship; Williams, Henry E & Melba L Hinson Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certificate.

WORK EXPERIENCE

Waiter at Abbey Roads Tavern and Grill in Fuquay-Varina, NC (March 2023- Present). Provide the customer with excellent service, ensuring their experience at the restaurant meets or exceeds their expectations. Must be able to communicate effectively in a fast-paced environment where working collaboratively, having a calm demeanor, and being able to multitask are paramount. Project manager at Dockside's Bar and Grill (June 2019-

August 2022). Focused on time management, assisting others in multiple areas, supplies, and completing various projects. Assisted in building two different restaurants with a team. Boot Rentals Specialist and Ski Technician at Ski Roundtop Mountain Resort (December 2018-March 2020). Helped customers whom it was their first time doing snow sports with their gear and educated them on having a fun and safe experience on the mountain.

EXTRACURRICULAR ACTIVITIES

Treasurer and member of the Phi Delta Theta Fraternity North Carolina Zeta Chapter, Philanthropic supporter of Live Like Lou Foundation, Intramural Sports

Jackson Shaw



EDUCATION

Campbell University, Masters of Business Administration, B.B.A. In Trust and Wealth Management, Minor in Financial Planning: Expected date of Graduation: May 2025; GPA: 3.234. Dean's list, Truist Business Scholar, Fiduciary Fund Investment Committee Founder, Scott Ellis Merit Scholarship, Administrative on Campus housing Scholarship, Alumni Book scholarship, Lundy Fetter School of Business Fellows, Newkirk Family Trust Management.

WORK EXPERIENCE

Keith Hills Golf Club, Part-Time Cart Staff, Buies Creek, North Carolina. (August 21, 2023, - Present). I spilt time in the Pro shop and outside in the cart barn. When I work inside, I work at the cash register interacting and communicating with customers and providing exceptiona; services to meet the customers needs. I am responsible for closing the pro shop and making sure the cash register and money is ready for the morning. When I work outside I am responsible for maintaining clean carts available to customers. I am responsible for picking the range, removing flags, maintaining range balls in the three ranges, and clearing practice facilities before closing. Campbell University, Student Worker-Graduate Assistant for Trust and Wealth Management, Buies Creek North Carolina. (August 2023- Present). Assist Director of Campbell's Trust program in preparation and execution of the Trust Advisors Forum. Handle a special project for the Director to recruit high school students into the Trust program. Aid the Business School's Director of Career Services and Professional Development with Career focused events. Perform other Business School duties as assigned. Wells Fargo, Personal trust Center Owned Team intern, Winston Salem, North Carolina. (June 5- August 11, 2023). I accomplished several months in advance of Administrative account reviews for admins. I had the opportunity to finalize two different investment projects for two different teams. I was tasked with completing a fees project where I had to gather and collect information on fees for different accounts. I concluded numerous opti code changes for open items for several different admins that were created from administrative account reviews. Reviewed and assessed important documents in 30 boxes of files. I was asked to review and create synoptic reviews for three different accounts. I daily checked mail and provided scanned copies to out-of-office admins or delivered it to admins personally.

EXTRACURRICULAR ACTIVITIES

Truist Business Scholar Program, Campbell Fiduciary Fund- Investment Committee, Day Trading, Campbell Intramural Sports, Weight Lifting, Golf, Church Volunteer.

Grant Solomonick



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2025; GPA: 3.92. 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; The John Hill Trust and Wealth Management Scholarship.

WORK EXPERIENCE

Summer of 2023: Wells Fargo - Trust Client & Advisor Services, Intern Analyst, Winston-Salem, NC. Assisted with creation of detailed trust summary documentation. Performed over 350 detailed Annual Account Reviews. Completed IRA account closing checklists. Executed Required Minimum Distributions as requested by clients. Acquired proficiency in SEI, TMM, and TMT platforms. Summer of 2022: 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.

EXTRACURRICULAR ACTIVITIES

Member of Phi Eta Sigma National Honor Society. Contributed as Campbell University Investment Fiduciary Fund team member. Designated as Youth Group Leader, Peace Haven Baptist Church. Competed athletically on Campbell University Club and Intramural Basketball teams 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.

Wade Sullivan



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 2026; Dean's List, GPA: 3.186. Scott-Ellis Scholarship, Administrative on Campus Housing Scholarship, Prillaman, Gregory Lee Trust Bus Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certificate.

WORK EXPERIENCE

Walnut Creek Country Club, Turf Management Assistant, Walnut Creek NC, (May 2022 – August 2022), (May 2023 – August 2023). As a turf management assistant, I worked on a team that completed a series of tasks that dealt with making sure the golf course and club area stayed in pristine condition. Vailhouse Restaurant and Oyster Bar, Dining Room Assistant and Cook, Goldsboro NC, (September 2020 – June 2021). I was responsible for making sure all

the dishes were clean and stocked for use. I also cleaned the tables to make sure customers had a clean eating area. I was also responsible for cooking and preparing all the oysters, shellfish, and appetizers.

EXTRACURRICULAR ACTIVITIES

Member of Club Baseball, Intramural Sports, Proficient in Microsoft Word and PowerPoint, Campbell Social Events.

Savannah Tyndall



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 2026: Dean's List, Scott-Ellis Merit Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, RA Housing Scholarship, Narron, James W & C Gray Johnsey Trust Scholarship, Administrative on Campus Housing Scholarship. Certifications Acquired: CPR and First Aid Certificate

WORK EXPERIENCE

Community Assistant for Campbell University Residence Life and Housing (August 2023 – Present). Responsible for system student check-in and check-out for on-campus housing. Implemented community building programs and events. Conduct Health and Safety checks to ensure the proper and safe use of Campbell's facilities. Responsible for responding to mental and emotional crises along with guidance for educational and facility issues. Caregiver and Educational Tutor, Kinston NC (May 2023 – August 2023) (May 2022 – August 2022) (August 2020 – August 2021) Responsible for the safety and entertainment of children ages two to seven along with the educational furtherance of ages seven to seventeen. Campbell Campus Recreation Official (August 2022 – Present) and Supervisor (October 2022 – Present). Responsible for facilitating on campus student-interactive sports events while maintaining a productive and friendly environment. Instructing other officials and students in rules, regulations, and equipment management. Piggly Wiggly Cashier, Kinston NC (April 2019 – July 2020). Entrusted with customer interaction, along with unloading, stocking, and blocking store products. Aided in making and displaying store sales tags and in office management tasks, such as counting and recording cashier till amounts for record purposes.

EXTRACURRICULAR ACTIVITIES

Intramural Sports, Proficient in Microsoft Word and PowerPoint, Attended Campbell Social Events.

Jonathan Whitmore



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. Chick-fil-A employee (2022-2023). Learned the values of serving and helping other and have to work in crucial situations.

EXTRACURRICULAR ACTIVITIES

Campbell University Football Team, Defensive Line (2020- present). Community Services with Boys and Girls Club in Lillington, North Carolina. Serviced the Campbell Residence Life by ing out mattresses and resupplying them with mattresses for the University. Community Service food drive for less fortunate in the community of Lillington, North Carolina.

Jared Williamson



EDUCATION

Campbell University, 4+1 Master of Business Administration, Minor in Financial Planning: Expected Date of Graduation: May 2025; GPA: 3.471, Dean's List, Presidential Scholarship, Administrative On Campus Housing Scholarship, Dixie Youth Baseball Scholarship, D.P. and Helen Russ School of Business Scholarship, Betty and Alan Schilpp Scholarship, Janice Daniels and Clifford Russell Miller Scholarship

WORK EXPERIENCE

Wells Fargo N.A. Wealth and Investment Management Analyst Intern, Winston Salem, NC (June-August 2023) As an intern analyst I assisted with running administrative account reviews, sat in on various meetings with management and clients, while learning about the inner workings of a trust department at a worldwide bank. I became fluent in systems such as SEI Trust 3000, FileNet,

SharePoint, and Trust Gateway. 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.