



CAMPBELL
UNIVERSITY

Lundy-Fetterman
School of Business

Trust & Wealth Management

2023 – 2024

**Permanent Hire
Placement Bulletin**

Candidate List

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

Ellia Bain

Jay McGill

David Becker

Derek Prillaman

Charitee Brown

Mia Parra

Jessie Delacruz

Justin Shirley

Taye Ghadial

Holden Simmons

Ayla Granberg

Hunter Smart

Tamsin Hart

Jose Solis

David Hayes

Zachary Spaugh

Hannon Herring

Jack Wilkes

Hayden Long

Luke Wood

Ellia Bain



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2024; GPA: 3.50. Campbell University Promise Scholarship, Lundy Fetterman School of Business Gordan B. Rowland Trust Scholarship, Lewis M & Annabelle L. Fetterman Business Scholarship, Out of State Scholarship, Sauls, Dr Ernest P. Business Scholarship, Southeastern Trust School Direct Aid. 2023 Trust Fiduciary Intern Candidate. Certifications Acquired: Brian Hamilton Foundation's Starter U Certificate, American Red Cross Adult First Aid/CPR/AED Certificate of Completion.

WORK EXPERIENCE

Cable Bahamas Group Limited (Nassau, The Bahamas) July 2023-August 2023 Consumer Solutions Summer Intern. Participated in meetings to gain insights into the cable and telecommunications industry. Assisted in TV network provider contract preparation, developed promotional packages, created Sales and Distribution Documents (SDDs). Collaborated with the pricing team to optimize the pricing strategy for promotional packages, enhancing competitiveness and profitability. Scotia Wealth Management (Nassau, The Bahamas) July 2022- August 2022 Fiduciary Summer Employee. Attended meetings and contributed to estate planning discussions, designed plans and portfolios tailored to estate goals, managed correspondence files, prepared client applications. Campbell University Campus Recreation Fitness Desk Attendant (Buies Creek, North Carolina) February 2022- Present. Keep the facility and equipment clean and neat. Attend all fitness staff training and meetings. Be attentive to patrons and their needs, maintain a safe environment for them to workout. Respond to all injuries/incidents and follow proper Emergency Action procedures (First Aid/CPR/AED certified). Wiggins Memorial Library Circulation Desk Worker (Buies Creek, North Carolina) December 2021 Present. Assisting patrons at the Research Assistance Desk by answering basic reference questions. Shelve and organize stacks. Answer phone calls. Offer printing assistance. John's Shoes and Accessories (Nassau, The Bahamas) December 2019. Holidays Sales Associate. Greet customers. Assist customers in deciding purchases. Stock and organize shelves. Bahamasair (Nassau, The Bahamas) June 2019-August 2019 Security Summer Student. Created documents for security worker schedule. Conduct plane searches, ensure all safety kits were in proper and correct condition, prepare planes for upcoming flights. File Documents. Bahamas Telecommunications Company (Nassau, The Bahamas) June 2017-August 2017. Human Resources Summer Student. Assisted with daily tasks including copying and filing resumes and creating cheques. Collaborated with senior employees to hold briefing seminars for upcoming summer students. Assisted with distributing cheques to summer employees. Volunteer/community service (Nassau, The Bahamas) 2016-2020. As a student of the prestigious

institution of Queen's College. Community service was a requirement. I spent a total of 60 hours volunteering at The Bahamas Red Cross, The Ranfurly home for children and Queen's College.

EXTRACURRICULAR ACTIVITIES

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

David Becker



EDUCATION

Campbell University, B.B.A in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2024; GPA: 3.519. Presidential Scholarship, North Carolina Needs Based scholarship, Eugene Maloney Trust and Wealth Management Endowed Scholarship, Dennis I. Bellefeuille School of Business Trust Endowment Scholarship, Wiggins, Norman Adrian & Mildred Harmon Scholarship.

WORK EXPERIENCE

Truist Fiduciary Intern, Estate Settlement team. June 2023- August 2023. I spent my summer of 2023 in Atlanta, Ga, working with Truist's estate settlement team. I assisted with, and performed, many activities such as account peer reviews, making changes to accounts, processing tax returns, filing documents in the will vault, estate valuations, and appraisals of various objects of tangible personal property. I was also involved in an estate

cleanout, where I worked alongside the appraiser, moving crew, and a few members of our team for a week straight to completely clean out the deceased client's house, and value the tangible personal property of the estate. BeckerTerra. March 2022-Present. This is my own landscaping business, currently filed as sole proprietorship. Services include hedge trimming, planting, mulch and pine straw installation, minor land clearing, and lawn maintenance. Being owner and only employee, I also make schedules, plan finances, run advertisements and marketing. My 40 clients count on me for my attention to detail and superb communication; two things they do not find with other landscaping businesses. Becker Construction Apprentice Carpenter and Assistant Project Manager. June 2018-2022. This is my dad's residential construction business. Involved in various activities around jobsites: scheduling, finances, figuring materials, etc. Assisted with the construction of various projects, such as houses, room additions, garages, decks, and concrete footings. Food Lion Retail Associate and Grocery Associate. May 2018- March 2020. Assisted customers in checking out their items. Stocked shelves and kept the store organized. Helped customers find what they were looking for and tried to make the best out of their shopping experience.

EXTRACURRICULAR ACTIVITIES

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

Charitee Brown



EDUCATION

Campbell University, B.B.A in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected date of graduation: May 2024. Campbell University Promise Scholarship, Women's Basketball, Athletic book scholarship, Whitehead, Lettie Pate Foundation Scholarship, Major Sam Byrd Trust Education Scholarship, Ernest P. Sauls Business Scholarship, Federal College Work Study, Administrative on Campus Housing Scholarship, Holly Springs United Church of Christ Academic Scholarship, Hope Harvest Church Academic & Book scholarship.

WORK EXPERIENCE

JumpStreet Indoor Trampoline Park Inc. Front desk staff, Court Attendant, and Party Host. As a hostess and Concierge, I assisted guest with professional greetings and help them get checked-in by providing wristbands and exchanging cash and card transactions. I also enforced safety rules within the jumping areas and attended to the children as they played to ensure peace and order for families. Polo Ralph Lauren Children's Sales Concierge. As a children's sales concierge, I created an easy shopping experience for customers by creating and providing style ideas for parents and constantly meeting weekly sales goals with an average of \$2,100 by being a hands-on worker. North Carolina Senate Page, as a high school student, I was given the opportunity to participate in legislative process by observing the law-making process while sitting in daily sessions and meetings. I assisted members and staff, including the senate by organizing paperwork and documents and answering phone calls. pOpShelf Backroom Associate, Stocker. As a backroom associate, I continuously organize the backroom with the new items received weekly through the trucks. I assisted customers on the floor when needed and continue to keep the floor full of items, so that the customers can have an easier experience. Intern experience with Truist in the trust admin group. I completed MDA's, business processes, as well as ACH letters.

Jessie DeLaCruz



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management. Expected date of graduation: May 2024. Dean's List, Presidential Honor Roll, Faith Grant, Lettie Pate Whitehead Foundation Scholarship, NC GEER II - Administrative On Campus Housing Scholarship, Campbell University Promise Scholarship, Federal Educational Opportunity Grant, Academic Merit Scholarship, North Carolina Need-Based Scholarship, JROTC (Outside) Scholarship, Sue Jenkins Weddle B W Memorial Scholarship, Southeastern Trust School Trust Management Scholarship, Lewis fetterman M & Annabelle L Business.

WORK EXPERIENCE

Quality Painting & Cleaning Company, Lee, Moore, and Harnett County, NC. Managing Director, June 2017 - Present. I compute agreements and contracts for the business with the clients, bookkeeping (monetary): I track

the expenses and revenue that goes through the business card, maintain contact with clients to ensure that they are content with the work, and keep them up to date with the process. I kept the marketing websites up to date, connect with anyone interested in being a client, and worked part-time as a painter and cleaner during the summer. Small Business Owner, May 2023 - Present. I started designing business cards for companies. I work with clients to ensure the company's services get advertised to the highest standard. The first few clients were satisfied and began to spread the word, so I went from doing one a week to three or more - weekly. Became proficient in digital design; cards included either Spanish or English language. Buy & Sell Properties, September 2023 - Present. I look for houses that are not in bad condition and can look better with minor fixtures, such as flooring, painting, and cabinet replacements. I am currently working on my first project, which includes painting and replacing the flooring - that way, I can resell and buy more properties later. Pilgrims, June 2021 - August 2021. I did labor work for 10 hours daily, Monday through Friday, in temperatures of 45 degrees and lower. I would inspect the chicken to make sure it did not have any bruises or broken bones, work in the Saddle Pack line, place portions of meat in its required packet, cut the bones out, place 25 lbs of chicken into a box, sealed it, and sent it off to the trailers.

EXTRACURRICULAR ACTIVITIES

Senior Class Representative, Campbell Student Government Association; Vice President, Campbell Activities Board; Worship Team Leader, FireStarters Ministry; Donor (Essentials), Haven Shelter; Weekly bible study, Girls Firm Foundations

Ayla Granberg



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2024. Cumulative GPA: 3.72. President's List, Dean's List, Peggy R. Lawrence Trust Scholarship, Presidential Transfer Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, D.P. & Helen Russ School of Business Scholarship, Dr. Ernest P. Sauls Business Scholarship, Emily Bratton MBA Endowment Scholarship, Charles D. "Skip" Fox, IV School of Business Trust Scholarship, Thomas J. & Anne Bell Keith Business Scholarship. United States Marine Corps Leadership and Management Course, Graduated August 2019. United States Marine Corps Supply Chain Management, Graduated April 2017. Truist Emerging Leaders Certification, August 2022.

WORK EXPERIENCE

Trust Operations Intern at First Covenant Trust & Advisors, June 2023 – August 2023. Contributed to the internal responsibilities review process for a comprehensive wealth management compliance audit. Successfully addressed compliance manager items for the annual account reviews, covering over 40% of total accounts, Formulated Investment Policy Statements in alignment with Financial Advisor's recommendations for over 150 accounts, ensuring regulatory compliance. Conducted in-depth review of historical client documents, enabling comprehensive assessment of their estate plan status and facilitating strategic planning for future steps. Trust Client & Advisor Services Intern Analyst at Wells Fargo Bank, N.A., June 6, 2022 – August 12, 2022. Examined file documentation to update required parties to act field on approximately 800 accounts. Investigated over 200 closed accounts for proper fund disbursement allocations. Screened the overdraft report daily to assure the correct upkeep of account balances. Customer Service Representative at Wake County ABC, August 2021 – Present. Delivered exceptional customer service through friendly greetings, addressing inquiries, resolving concerns, and assisting customers in locating desired products. Proficiently operated cash registers, skillfully processing payments via cash, automatic debit, or credit card, and accurately provided change and receipts to customers. Maintained a clean, organized, and well-stocked cashier station, ensuring a smooth and efficient checkout experience for customers. Center Store Associate at Food Lion, August 2020 – August 2021. Provided fast, friendly, quality customer service to shopping patrons. Maintained grocery shelves by cleaning, stocking, and organizing allocations from tag to tag. Replenished merchandise on the sales floor in a timely manner. Trained new associates on Food Lion's policies and procedures. Aviation Supply Specialist at United States Marine Corps, September 2016 – September 2020. Spearheaded technical research initiatives, meticulously validating and processing over 1,500 requisitions to meet organizational demands. Maintained Protected Stock levels for 37,125 total line items worth more than a total EMV of \$125,000,000. Established a Global Communications System management program. Developed Support

Packages tailored for streamlined deployment of operational units, ensuring optimal readiness and functionality. Administrative Assistant at McCormick Law Office, July 2015 – August 2016. Developed system to track postage and copies for each of the more than 100 personnel files. Answered multi-line phone system and assist caller with their questions or concerns. Promptly respond to email and mail correspondence. Organized correspondence and documents into logical order within each personnel file. Theatre Crew at New Richmond 8 Theatre, February 2013 – August 2014. Provided exceptional customer service by assisting patrons with ticket purchases, concessions, and resolving inquiries, resulting in consistently high customer satisfaction ratings. Maintained cleanliness and tidiness of the theatre, including cleaning auditoriums between showings and restocking supplies. Demonstrated strong cash handling skills, accurately processed payments, and balanced cash registers at the end of shifts. Played a pivotal role in the training process for new hires, facilitating their smooth integration into the team and ensuring consistent adherence to company policies and best practices.

EXTRACURRICULAR ACTIVITIES

Marine Corps Martial Arts Gray Belt

Tamsin Hart



EDUCATION

Campbell University, B.B.A in Trust and Wealth Management, Minor in Financial Planning, expected date of graduation: May 2024, GPA 3.344. Campbell University Promise Scholarship, Women's Tennis Scholarship, Women's Tennis Room and Board, Athletic book scholarship, Athletic Insurance Coverage. Certification acquired: Brian Hamilton Foundation's Starter U Certificate.

WORK EXPERIENCE

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

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

EXTRACURRICULAR ACTIVITIES

Guitar player, acoustic as well as electric

David Hayes



EDUCATION

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

WORK EXPERIENCE

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

interning as interning my summer Junior year in Atlanta with Truist. I spent the bulk of my summer internship on a project involving small trust termination where we would terminate accounts below state market value requirements.

Hannon Herring



EDUCATION

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

WORK EXPERIENCE

State Employees Credit Union June 2022-August 2022
Trust Planning Intern Raleigh, North Carolina Learned how complete and log planning worksheets, plan estate planning essentials program appointments, scan and log will files, scan and log power of attorney documents, and completed discretionary distribution requests. Work duties included managing weekly tasks assigned, rotating through the daily activities listed above, and job shadowing. Gained experience in various trust planning

software's, utilized teammates to answer trust rep calls, and participated in weekly TAC meetings. Wealth Fiduciary Intern for Truist, June 2021- August 2021. Learned how to utilize various banking websites which allowed for the completion of assigned tasks. Work duties included managing spreadsheets, uploading investment statements, performing annual account reviews, and reviewing irrevocable trust accounts. Home Constructor, member of the Framing Crew for Whitehead Enterprises, June 2020- August 2020. This job was comprised of all components necessary to the construction of building a house or remodeling bathrooms. Recorded measurements, operated saws, used nail guns, and utilized many other essential tools for the job. Participated in demolition, remodeling, constructing, and fine finishing. Cashier, Customer service, at Medical Village Pharmacy, May 2017- July 2019. Properly operated a register along with advanced medical system the pharmacy uses to keep track of all the customer's medications. Answered phone calls from customers and relayed their needs to the pharmacists. Was responsible for managing inventory of pills, filling prescriptions for checking, cleaning the pharmacy, and restocking shelves with drugs and home goods.

EXTRACURRICULAR ACTIVITIES

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

Hayden Long



EDUCATION

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

WORK EXPERIENCE

Trust Advisors Institute, Campbell University. Worked as a teaching assistant which caters to people in the trust industry to continue their education. Listened to course lectures and while taking notes to further understanding of subject matter. Helped students with course material such as financial planning, estate planning, and tax planning strategies. Learned trust fundamentals and given the opportunity to review a real trust case delivered to the student. Helped students with directions and general hospitality in a professional and courteous manner. Seymour Funeral home, Assistant Funeral Director, December 2019-August 2022. Tasked with creating playlists and background multimedia for the funeral services. Assisted with responding to phone calls regarding pricing and scheduling, making deliveries to the post office, dropping off equipment at clients' homes, delivering and verifying paperwork, general cleaning, taking down tents and other equipment after services, as well as media management of the funeral service. Greeted clients while providing directions and instructions related to funeral services. Directed traffic and organized parking of funeral service for quick entry, dismissal, and a smooth service. RBC: Royal Bank of Canada Finance Intern- Worked with financial advisors to update the keyphrase system so that they could freely access the documents they needed by just using the name of the document rather than the code attached to the document for more convenient access. Built financial models with the assistance of the advising financial advisor. Led client prospecting by setting up google adsense account to assist in making the financial advisors website more accessible. Supervised the review of other financial advisors to see if they were suitable for purchasing their book of business and worked with the financial advisor whom I helped in this endeavor to determine what would be the best way to approach these people to open the conversation to purchase their book of business. Worked in the operations department of the bank which included going over all the mail that came into the office and organizing it so that each financial advisor received what mail was directed to them. Deposited and franked all the checks for the office and conducted a FINRA Broker Check for the office. Sat in on meetings with clients to understand how they conduct themselves with the client as well as attended client connection

events. Participated in office meetings and presentations relating to sales of financial products to the office and how this will benefit the efficiency of the financial advisors.

EXTRACURRICULAR ACTIVITIES

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

Jay McGill



EDUCATION

Campbell University, Master of Business Administration, B.B.A in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2024. Overall Undergrad GPA: 3.554. Overall Graduate School GPA: 4.0. Campbell University Dean's list 2020 Fall, 2022 Fall. Campbell University Presidents list 2021 Spring, 2023 Spring. Recipient of many scholarships including: Presidential Scholarship, Fetterman, Lewis M & Annabelle L Business #1 Scholarship, The Prillaman, Gregory Lee Trust Business scholarship, Baptist Foundation Luther H. Butler Scholarship, Croft, Herbert Stanley Trust Education Scholarship, Clark Brothers Business Scholarship, and Sauls, Dr Ernest P. Business Scholarship. 2020, East Bladen High School, Graduate. Bladen Community College Graduate with an Associate of Arts Degree.

WORK EXPERIENCE

Fort Caswell Staff Member (2016), White Lake Marina (2017-2021), White Lake Marina managing a team of 8 by planning work schedules and events (2019-2021), launched and managed a landscaping business maintaining 5 properties (2017- 2021), Campus Recreation at Campbell University, refereed multiple sports (2021), Campus Grill at Campbell University (2021). Manage a personal stock portfolio (2020-present), State Employees Credit Union Trust Services Intern (2022 Summer). Generational Group Intern, worked with individuals that are selling their businesses with financial planning after the sell (Summer 2023), Graduate Assistant at Campbell University Student Union, Plan, setup team, and supervise events (2022-present)

EXTRACURRICULAR ACTIVITIES

Grand Master (President) of the Sigma Phi Chapter of the Kappa Sigma Fraternity. Intramural sports. Club Tennis. Club Soccer. Small group bible study. Volunteer at White Lake Church Camp and Retreat center, cleaning rooms and serving food. Serve the homeless in New York City by giving out care packages and feeding the homeless at The Bowery Mission and The New York City Rescue Mission. Worked with Operation Christmas Child and partnered with a church in Vadul lui Isac, Moldova to provide for children in need. Love to play many sports including Soccer, Golf, Disc golf, and many more.

Derek Prillaman



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2024; Graduate GPA: 4.0. Undergraduate GPA: 3.786. President's List, Dean's List, Truist Business Scholar, Campbell University Presidential Scholarship; Lundy Fetterman School of Business Student Body Scholarship; Lundy Fetterman Business Fellows Scholarship; Grace White & Gilbert Thomas Stephenson Scholarship; The Newkirk Family Trust and Wealth Management Scholarship; Dr. Ernest Paskel Sauls Business Scholarship; The Lewis M. and Annabelle L. Fetterman Business Scholarship; Administrative on Campus Housing Scholarship; Wells Fargo Team Members' Dependent Children Scholarship; National Society of the Daughters of the American Revolution Scholarships; Veterans of Foreign Wars Essay Contest Scholarship; The Bonner H. and Wilma D. Jones Endowment; Harris, Robert Adrian School of Business Scholarship; Fetterman, Lewis M &

Annabelle L Business #2 Scholarship; Louise B. Witherspoon Trust Scholarship; Paschal, Mary Scholarship.

WORK EXPERIENCE

Campbell University Lundy-Fetterman School of Business, Graduate Assistant & Trust and Wealth Management Graduate Assistant; Buies Creek, North Carolina (January 2022-Present), Assist faculty and staff members with tasks relevant to the Lundy-Fetterman School of Business. Support the Director of Trust and Wealth Management with preparations for the Annual Trust Advisors Forum. Seacoast Wealth Management Intern/Analyst; Wilmington, North Carolina (June 2023-August 2023), Provided recommendations on portfolio allocations and investment opportunities to help minimize client risk and diversify holdings while considering tax ramifications. Conducted investment analysis of top client holdings; Assisted with client meetings and financial reviews. Gained experience using LPL Financial ClientWorks software, and Redtail CRM. Wells Fargo, Wealth and Investment Management Intern/Analyst; Winston-Salem, North Carolina (June 2022-August 2022), supported the philanthropic client management team, completed annual account reviews, performed account maintenance and tax-exempt filing activities, assisted with account closings, researched and dispositioned outstanding checks, participated in calls with grant, scholarship, client management team, and other members of the philanthropic services department. Gained experience using SEI Trust 3,000, Trust Gateway, FileNet, GuideStar, SharePoint, and additional software. Twiddy and Co. Realtors, Field Services Intern, Corolla, North Carolina (May 2021-August 2021), Assisted guests with various tasks such as troubleshooting issues within homes while exemplifying a high level of professional guest service.

EXTRACURRICULAR ACTIVITIES

Scholar, Truist Business Scholars Program; Vice President, Campbell University Club Tennis; Truist Emerging Leader Certification; Vice President of Membership, Future Business Leaders of America (2021-2023); Member, Camel Chapter Ducks Unlimited (2020-2022); Lundy-Fetterman School of Business, BADM-100 Peer Mentor (2021); Microsoft Office Proficiency, Word, PowerPoint.

Mia Parra



EDUCATION

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

WORK EXPERIENCE

Wells Fargo, Wealth and Investment Management, ILIT, Intern Analyst, Winston-Salem, NC. Gaining a deep understanding of Irrevocable Life Insurance products, including their features, benefits, and tax implications. Learned how to assess client's financial needs and goals, particularly in the context of estate planning and wealth preservation. Analyzed legal documents, trust agreements, and other estate planning tools to provide comprehensive solutions. Clay Blue, CPA PLLC, Tax Associate Intern, Fuquay-Varina, NC. Support Professional Tax Preparers with financial and accounting responsibilities, including preparing federal and state tax filings. Prepared tax returns for individuals and assisted in bookkeeping/accounting for small businesses and corporations. Researched updates on current tax laws and codes. CAPTRUST Financial Advisors, Compliance Department Intern, Raleigh, NC. As a Compliance Department Intern, I reinforced books and records by conducting a summer project involving Alternative Investments and Private Covered Securities. Guided through the Company's Compliance Department Software (MCO) completing various tasks such as processing mergers and acquisitions as well as initiating the offboarding process. College Democrats of North Carolina, Finance Associate. Assisted in fundraising and accomplishing goals. Applied research and data into fundraising, as well as keeping donor research and donations organized. Nash County Parks and Recreation, Site Supervisor, Nashville, NC. Over sought projects and managed staff while maintaining safety protocols and implementing site procedures. Duties included preparing and filing reports, handling emergencies, and managing facilities control during a pandemic. One Connection Inc., Sales Associate, Wilson, NC. Assisted in showcasing and selling cell phone products. Interacted with customers throughout all phases of the sales process. Ensured customer satisfaction through excellent sales service as well as assisting with customer's needs and delivering information on products.

EXTRACURRICULAR ACTIVITIES

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

Justin Shirley



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected date of graduation: May 2024; GPA: 3.871; President's List, Dean's List, Presidential Scholarship, Top 10 Percent Award, Truist Business Scholars Award, Dr. Ernest P. Sauls Business Scholarship, John Hill Trust and Wealth Management Scholarship, Becky T. Kelly School of Business Scholarship, Lewis M. and Annabelle L. Fetterman Business Scholarship #2, Jessica N. White Endowed Scholarship.

WORK EXPERIENCE

State Employees Credit Union (Raleigh, NC), Trust Services Intern, June 2023-August 2023. Examined member estate planning documents to identify any possible conflicts or issues with fiduciary roles or language of distribution. Communicated with experienced trust planners to learn different applications for unique trust planning techniques. Gained experience in several different trust planning software's through my daily activities. Walgreens (Garner, NC), Customer Service Associate, June 2022-August 2022. Greeted and took care of any customer requests while running the cash register. Maintained and utilized knowledge of all sales, promotions, and store policies. Jersey Mike's (Sanford, NC), Team Member, June 2021. Learned how to effectively multitask in a timely manner. Collaborated with fellow employees about ways to efficiently complete duties and tasks. Shirley Electrical (Wendell, NC), Laborer, June 2018-August 2018. Assisted other employees in keeping the work site clean and organized. Improved technical and communication skills by working with seasoned employees.

EXTRACURRICULAR ACTIVITIES

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

Holden Simmons



EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. In Trust and Wealth Management, Minor in Financial Planning: Expected graduation date: May 2024. Scott Ellis Scholarship, Administrative on Campus Housing Scholarship.

WORK EXPERIENCE

Truist intern with the investment management team. I worked with software and tools commonly used in investment management, such as Excel, financial modeling, and data analysis tools. I also assisted with an Investment project to create a manual describing how to properly navigate an Excel spreadsheet with over one thousand Client investment accounts. Worked closely with teammates, assisting with daily tasks such as investment team analysis, mailing client IPS reports, and daily trade blotter reports. North Carolina Zoo, Environmental Services Employee, Asheboro, NC. As

an environmental services employee, I assisted guests with various tasks, questions, and concerns while maintaining a clean and safe environment. Dali Distributing, Office Assistant, High Point, NC. In this role, I handled incoming calls and other communication, managed files and important documents, prepared items for shipments, and received incoming shipments. Walmart, Stocking and Unloading Employee, Asheboro, NC. I organized and stocked various products in this position while keeping the aisles clean and accessible. Assisted customers with price checks and helped locate items in the store. I worked with team members to unload shipments and sorted products to designated areas.

EXTRACURRICULAR ACTIVITIES

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

Hunter Smart



EDUCATION

Campbell University Bachelor of Business Administration: Trust and Wealth Management Major; Master of Business Administration (5thYear- 4+1 MBA Student) Undergrad GPA: 3.773 MBA GPA: 4.000 Presidential Scholarship, Top 10 Percent Award, FFA Scholarship, Keith, Thomas Joseph & Anne Bell Business Scholarship, Jerry M & Betty B Wallace Trust Scholarship. Mae Murry Griffin Bruton Business Undergraduate Scholarship

WORK EXPERIENCE

Advocacy Trust (Mooresville, NC) Trust Administrator Intern: Assisted a team of Trust Administrators with an extensive book of Special Needs Trust accounts, Shadowed an experienced team of Trust Officers, Trained on various software programs to assist with fiduciary duties such as InverstorsView, SAFE, and Addvantage Designed and monitored new client distribution trackers

Performed annual account reviews and crafted distribution requests daily. Mabry's Drug and Home Care (Hamlet, NC) Remote Oxygen Compliance (Current) Remotely manage a list of around 1500 home health oxygen patients in Brightree, Run compliance reports and organize contact information and scheduling using Excel, Contact patients daily regarding insurance compliance, doctor's appointments, and new prescriptions, Draft and mail patient recertification letters, Customer Service/Delivery Technician Provided customer service to patients in person and over the phone, Delivered patient medication daily, Electronically filed medical records, prescriptions, and sales orders to online database

EXTRACURRICULAR ACTIVITIES

Social Media Freelance Photography Business, Campbell University Accounting Club, Various Intermural Sports

Jose Solis



EDUCATION

Campbell University, Master of Business Administration (Proposed Applicant) with BBA in Trust and Wealth Management, Minor in Financial Planning. Expected graduation: May 2023. Received multiple scholarships including Scott-Ellis Scholarship; North Carolina Need Based Scholarship; James W. Narron and C. Gary Johnsey Trust Scholarship. Received Dean's List. Wells-Fargo Undergraduate Trust and Wealth Management

WORK EXPERIENCE

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

skills necessary to multitask and prioritize what objectives to complete to be efficient. Understanding the trust documents of each account and what to do when a problem arises to that specific account based on those documents. Applied understanding on how to work in a corporate setting and use a system specific to that organization. Intramural Referee and Supervisor at Campbell University, March 2021 – May 2023. Officials are tasked with the responsibility to provide a safe environment where players can be competitive and have fun at an appropriate level to maintain fairness, control, and safety. Coordinate with the supervisor so that players understand the rules and respect each other while following said rules. Provide a friendly, upbeat, and customer service-oriented environment. City National Bank; May 2023 - July 2023. Worked as an intern during the summer for the Summerlin team in Las Vegas, Nevada for Personal Trusts. Responsibilities included creating transactions for clients on a day-to-day basis, looking over their asset profiles, interacting with the other departments in the Summerlin office such as Financial Management and Sale Representatives, and working with another Campbell Intern for an important project centered around ILITs. Campus Recreation GA; August 2023 - PRESENT; Working as the manager on a day-to-day basis of the Campbell Gym. Creating schedules on a monthly basis and making sure the environment is at a suitable standard for student development as every employee is a student.

EXTRACURRICULAR ACTIVITIES

Secretary, Treasurer, and Social Chair of the Phi Delta Theta Fraternity North Carolina Zeta Chapter, Member of Club Spikeball, Member of Club Brazilian Jiu Jitsu, Phi Eta Sigma National Honor Society, Recreational Service Graduate Assistant for Campus Recreation, Campbell Catholic.

Zachary Spaugh



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: December 2023; Overall GPA: 3.79; Dean's List; President's List; Lundy Fetterman School of Business Fellows Scholarship, Scott-Ellis Scholarship, Dr. Ernest P. Sauls Business Scholarship, Benjamin M. Hawkins Trust Scholarship, Newkirk Family Trust Management Business Scholarship, Lewis M. and Annabelle L. Business Scholarship, NC Baptist Scholarship Program, John Hill Trust and Wealth Management Scholarship, Susanna Murray Bus Klimczak Scholarship, Peaden's Seafood Restaurant & Catering BUS Scholarship, Edith C. and Raymond L. Mulkey Jr. Scholarship, Mary Paschal Scholarship

WORK EXPERIENCE

Wells Fargo, Philanthropic Services, Winston-Salem, NC, Summer Intern; June 2023- August 2023. Assisted Grant team with applications, payment dates, and progress reports. Completed AARs. Helped Agency, Market Service, and CMT teams with additional tasks. Wells Fargo, Philanthropic Services, Winston-Salem, NC, Summer Intern; June 2022- August 2022. Stopped and reissued outstanding checks. Completed AARs. Completed 1023 application forms and sent them to lawyers. Assisted admins with additional tasks..Moravian Ministries Foundation of America, Winston-Salem, NC, Summer Intern; May 2021- July 2021. Grant consultant for the MMFA 2021 Grant Cycle. Advised applicants on which grant to apply for based on their proposed project and funding interests, process for submitting grant requests, and how to make their applications stand out from others. Received grants and organized them in MMFA database. Tracked and organized data detailing the 2021 grant cycle, and prepared and presented this information to the MMFA Discretionary Grant Advisory Committee. Organized and updated MMFA database using Raiser's Edge NXT. Made updates to new MMFA website, using WordPress, in preparation for its launch. Organized all previous MMFA Board meeting minutes in chronological order. Led a project to analyze investment models used at comparable foundation of faith. Cedar Lakes, Raintree, Little Creek Condominium Complexes, Winston-Salem, NC, Assistant Maintenance Worker; 2017-2021. Assisted in general upkeep and maintenance of all three condominium complexes. Work included painting, carpentry, plumbing, electrical, concrete, and general cleanup of complexes.

EXTRACURRICULAR ACTIVITIES

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

Jack Wilkes



EDUCATION

Campbell University, Pursuing Master of Business Administration (4+1 Program), B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: December 2023. GPA: 3.525. Men's Football Scholarship, Scott-Ellis Scholarship, Administrative On Campus Housing Scholarship, Schilpp Betty and Alan Scholarship, Athletic Book Scholarship, Men's Football Room and Board Scholarship. Big South Conference Academic Honor Roll (2020). Dean's List (2020).

WORK EXPERIENCE

Trust Associate, Wells Fargo Wealth Management, Austin, TX (June 2023 – August 2023). Assisted Trust Officers and FITT closing group on internal and external bank transfers of up to \$10 million by reviewing governing documents and transfer paperwork. Completed in-depth annual reviews of Investment Management Accounts to ensure accounts are accurately updated for fees, discounts, and coding. Processed discretionary requests by thoroughly reviewing the governing document's dispositive provisions to ensure requests met the guidelines of the trust. Determined the valuation of current assets and overall market value of trusts by calculating current depletion based on previous and current discretionary requests. Distributed funds directly to clients after review and upon approval. Fiduciary Intern, Truist Wealth, Atlanta, GA; Virtual (May 2022 – August 2022). Conducted financial analytics to help investment managers serve their clients. Engaged in valuable research on emerging markets and their effects on individuals' portfolios. Created investment policy statements for the compliance department using information gathered from Salesforce.com. Glossary Author, Atticus Probate and Estate Settlement, (April 2022 – Present). Created an online glossary consisting of probate and estate settlement terms for their online estate settlement and inheritance distribution service. Youth Sports associate, YMCA, Charlotte, NC (2017-2018). Maintain order and fairness while officiating youth football, basketball, and soccer. Collaborate with other officials to problem solve and make the games a good experience for the youth. Encourage Charlotte youth to develop a strong work ethic in a fun environment while teaching valuable life skills such as discipline, teamwork, and good sportsmanship. Strong entrepreneurial spirit: creation of my own eBay store reselling items and maintaining a 100% positive customer satisfaction rating, as well as utilizing social media to secure various short-term jobs including moving furniture, yard work, and personal training. Responsible for the heavy lifting of customers' furniture and household items while using caution and care in the handling of these items. Organize, pack and transport items of all sizes and types. Also involved in the building of pools, fire pits, and the landscaping of yards.

EXTRACURRICULAR ACTIVITIES

Campbell University Football Team, Linebacker (2019 – Present). Campbell University Football Unity Council: Lead a Division 1 football team as one of two voted representatives from each class to serve as the governing body of the team consisting of over 100 men, while working closely alongside the coaching staff and other elected teammates to provide feedback and suggestions to promote an exceptional team experience. Campbell University Student Athlete Advisory Committee (SAAC): facilitate communication and involvement between student-athletes and administrators, as well as the rest of the student body. Meet every month to address specific concerns, as well as plan events.

Luke Wood



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2024; Cumulative GPA: 3.919. President's List, Dean's List, Truist Business Scholar, Truist Emerging Leadership Certification. Received Presidential Scholarship, Top Ten Percent Award, James E. Witherspoon Trust Scholarship, Moen Incorporated Scholarship, School of Business Student Body Scholarship, David D. Butler Trust Scholarship, Harold B. Wells Entrepreneurship Scholarship, Dr. Ernest P. Sauls Business Scholarship, Lewis M. and Annabelle Lundy Fetterman Business #2 Scholarship, Fred G. Hale Memorial Business Scholarship, David and Krista Wharton UG Business Endowment Scholarship.

WORK EXPERIENCE

Auctioneer, Mouths of the South Auction Company, Benson, NC, part-time; July 2021-present. Carry out wishes of the client or client's estate by selling of personal or real property. Coordinate with auction management and client to organize items and property for sale. Provided excellent customer service to auction-goers by answering questions and communicating with management.

Trust and Estate Administration Intern, State Employees' Credit Union, Raleigh, NC, internship; July 2023-present. Prepared discretionary distribution requests for presentation to the Trust Committee. Conducted real estate reviews, account synoptics, and initial due diligence for potential new accounts. Observed and created summaries for in-person client meetings. Peer Mentor, Campbell University Lundy-Fetterman School of Business, Buies Creek, NC; July 2020-April 2023. Led a group of up to seven freshman students through their transition to college, building friendships and connections. Collaborated with students to develop understanding of the design thinking process for use on entrepreneurship projects. Effectively communicated and delivered project materials to students for use in the BADM-100 class. Trust Planning Intern, State Employees' Credit Union, Raleigh, NC, internship; July 2022-August 2022. Examined client estate planning documents to identify fiduciary roles and distribution language. Reviewed estate planning documents and planning notes to determine planning techniques. Communicated with Trust Officers to prepare reviews for distribution requests. VITA Volunteer Tax Assistant, Internal Revenue Service, Lillington, NC; January 2022-April 2022. Prepared tax returns for the volunteer tax help and preparation site in Harnett County, NC for Campbell University. Conducted quality reviews of tax returns and answered taxpayer questions regarding their specific return and the return process.

EXTRACURRICULAR ACTIVITIES

Member of the Auctioneer's Association of North Carolina, July 2023-present; Member of Phi Kappa Phi Honors Society, April 2023-present; Member of Truist Business Scholars at Campbell University, April 2021-present; Member Phi Eta Sigma Honors Society, April 2021-present.