



**CAMPBELL**  
**UNIVERSITY**

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Lundy-Fetterman  
**School of Business**

**Trust & Wealth Management**

**2024– 2025**

**Intern Placement Bulletin**

# Candidate List

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

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**Mark Allen**

**Ian Autry**

**Domonic Baker**

**Ashlyn Baucom**

**Victoria Bennett**

**Broc Bidwell**

**Charles Blizzard**

**Cole Boggs**

**Ethan Brooking**

**Mackenzie Campbell**

**Maddox Capps**

**Aniya Caudle**

**Jessica Couts**

**Raelynn Cox**

**Abigail Croom**

**Kara Daniels**

**McKenna Duncan**

**Conover Gall**

**Jayden Giles**

**Christian Gilmore**

**Landon Green**

**Richard Hager**

**Johnathan Hill**

**Logan Ladue**

**Bryson Lee**

**Charles Lewis**

**Luke Magee**

**Sean Mcdowell**

**Steven Mirabile**

**Davis Neff**

**Grace Newby**

**Matthew Pennington**

**James Peterson**

**Hayden Phaturros**

**Sadler Powell**

**Tyler Renken**

**Grant Spangler**

**Aaron Spivey**

**Wade Sullivan**

**Abigail Tuyó**

**Savannah Tyndall**

**Elijah Walsh**

**Claire Witt**

**Paul Wright**

## Mark Allen

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### EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management and PreLaw; Expected Graduation: May 2026; GPA: 3.872 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, Scott Ellis Merit Scholarship, Housing Scholarship, and H. W. Clarke Memorial Scholarship (outside scholarship).

### WORK EXPERIENCE

Wells Fargo, Intern (May 2024- August 2024). I gained in-depth knowledge of the operations of a personal trust department and built strong relationships within the Wells Fargo Personal Trust Department Team. I became proficient in SEI, Trust Management Tool, and Image View. My daily responsibilities included reviewing trust documents and ensuring accurate coding in all essential software programs. During my time at Cramer Mountain Club Restaurant from May 2023 to August 2023, I honed my communication skills and adeptly guided club members to their designated seating areas. I was swiftly promoted to the role of server within two weeks of joining and built strong connections with both the members and my colleagues. As a server, I prioritized guest satisfaction and ensured the timely delivery of their orders. Briar Patch Greenhouse, Laborer (January 2021- September 2022). Ensured that all plants were placed correctly, with the added responsibility of counting each one to ensure accurate invoicing and payment. Suggested a proposal to save the company money by working directly with the owner in a cost-effective to arrange and implemented said proposal.

### EXTRACURRICULAR ACTIVITIES

Member of the Campbell University Trust Scholars, Member of the Campbell University Trust Business Scholars, Member of the Campbell University's Sound of the Sandhills Marching Band, Campbell University Wind Ensemble, Mentor to underclassmen in the Big Camel/Little Camel Program, Member of the Campbell University Wind Symphony, Member of the Campbell University Pep Band. Proficient in Microsoft Office Word and PowerPoint.

## Ian Autry

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2026; Overall GPA: 4.00; President's List; Scott-Ellis Merit Scholarship; Jessica N. White Endowed Scholarship

### WORK EXPERIENCE

Nash County Republican Party, Volunteer; October 2020. Utilized strong customer service and marketing skills while handing out campaign materials and signs at an early voting station. Responsible for being knowledgeable about major issues and candidates and maintaining compliance with regulations for campaigning at early voting sites.

### EXTRACURRICULAR ACTIVITIES

Campbell University College Republicans, Member; Campbell University Students for Life, Member; Proficient in Microsoft Word, Excel, and PowerPoint

## Domonic Baker

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### EDUCATION

Campbell University, Masters of Business Administration, BBA in Trust in Wealth Management, Minor in Financial Planning; Expected Date of graduation: 2027; Overall GPA: 3.34; Dean's List; NCWA Academic All-American, Academic All-Conference, Men's Wrestling Athletic Scholarships, Marvin D. Johnson Trust Management Endowment Scholarship Trust

### WORK EXPERIENCE

Trust Advisors Institute, Student Assistant, Buies Creek, NC, Summer Job/Learning experience; May 2024 - June 2024. Assisted in preparing learning materials, setting up the classroom, and helping the students with any needs. Gained more learning experience in all areas of Trust including; Fiduciary law, Financial Planning, Estate Planning, and Investment. Cushman & Wakefield, Job Shadow (Mark Douglas, Senior VP); August 2024. Followed Mr. Douglas on his daily routine, learning the ins and outs of Commercial Real Estate. Gold's Gym, Richmond, VA, Sales Representative; September 2022-2023. Worked closely with fitness trainers and management to coordinate sales efforts. Ensured processing of memberships and billing information. Built and maintained strong relationships with gym members, and resolved member concerns and challenges. Vinaterra, Cart Attendant, New Kent, VA; May 2021 - September 2021. Ensured carts were clean and in good condition. Interacted with customers to ensure a pleasant golfing experience. Resolved issues such as cart shortages or maintenance problems, and organized carts efficiently. Chick-fil-A, Cashier, Mechanicsville, VA; April 2020 – October 2020. "My pleasure".

### EXTRACURRICULAR ACTIVITIES

Campbell University Men's Wrestling Team, Volunteer Wrestling Coach at Virginia Team Predator, Volunteer at Caritas, Fellowship Of Christian Athlete

## Ashlyn Baucom

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### EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected Date of Graduation: May 2026 GPA: 3.147; Scott Ellis Merit Scholarship; Wiggins Norman Adrian & Mildred Harmon Scholarship; Truist Business Scholars Program Scholarship

### WORK EXPERIENCE

Internship with Narron Wenzel, P.A. (August 2024-Present). Shadowed and learned the daily tasks of an Estate Attorney. Helped with legal assistant duties. Attended meetings with clients. Thanks a Latte Barista (July 2023-Present). Provided exceptional customer service with consumables and merchandise. Greeted and interacted with customers in a friendly and efficient manner. Accurately take orders and prepare coffee and tea beverages. Efficiently assisted customers within the boutique to find a product that fit their needs. Work closely with team members to provide adequate service and thorough opening and closing procedures. La-Z-Boy Furniture Galleries (May 2022-August 2023). Certified Retail Specialist. Completed the peak performance retail selling system training and product knowledge training. Utilized training to lead, guide, and direct customers to help them find a product that meets their needs. Assisted marketing management team with advertisements and creating social media content. Developed skills to identify target markets and design social media campaigns.

### EXTRACURRICULAR ACTIVITIES

Truist Business Scholar, Peer Mentor for Freshman Seminar in Campbell Business School, Alpha Delta Pi Iota Beta Chapter Member: Vice President of Membership Development (Present), Director of Public Relations (Present), Campus Activity Board Event Planner, Intramural Sports, Microsoft Word, Excel, and Powerpoint Proficient, Canva Proficient

## Victoria Bennett

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2027; GPA: 3.679. Dean's List, Presidents List, Scott Ellis Merit Scholarship, Administrative on Campus Housing Scholarship, Campbell Honors Program Housing Scholarship, Jerry and Betty Wallace Business Scholarship, Truist Business Scholars Program Scholarship

### WORK EXPERIENCE

Chili's Server, Garner, NC (May 2024- present). Provided customer service. Handled money and performed various tasks under constricted time frames. Campus Recreation, Carter Gym Attendant and Official, Buies Creek, NC (August 2022- present). Welcomed and checked in patrons. Assisted supervisors in setting up athletic events. Managed sportsmanship conduct during games. Made calls

when people took actions that were not allowed. Lead the teams in starting games. Locked and Loaded Bar and Grill, Server, Garner, NC (May 2023- August 2023). Provided customer service. Handled money and performed various tasks under constricted time frames. Raleigh Parks, Recreation and Cultural Resources, Lifeguard, Raleigh, NC (July 2019- August 2021). Instructed the proper way to put lifejackets on children. Assisted children in putting on lifejackets. Maintained and enforced the rules of the facility. Communicated with patrons and answered questions about what our facility offers. Participated in monthly training for working as a team.

### EXTRACURRICULAR ACTIVITIES

Campbell University Honors Program; member, Honors Social and Cultural Subcommittee; Chair, Future Business Leaders of America; Vice President of Community Relations, Omicron Delta Kappa; member, Lundy Fetterman School of Business Truist Business Scholar; member, Trust Fellows; member, Rose Center for Peer Mentorship; mentor

## Broc Bidwell

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### EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management: Expected date of graduation: May 2026; GPA: 3.778. Athletic Scholarship (Basketball), Thomas and Judy Folwell Trust Management Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certification.

### WORK EXPERIENCE

Truist Estate Services Intern (June 2024-July 2024). Reviewed account fee schedules for Senior Estate Advisors' books of accounts. Co-authored 2 compliance procedures regarding Estate Administration. Participated in Estate Services team meetings handling accounts stretching through multiple states on the east coast. 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

## Charles Blizzard

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2027; GPA: 3.739. Dean's List, Southeastern Trust School Trust Management Scholarship, Truist Business Scholars Program Scholarship, Scott Ellis Merit Scholarship, James A. Campbell Scholarship, Dr. Ernest P. Sauls Business Scholarship, Peggy R. Lawrence Scholarship, Lewis M. & Annabelle L. Fetterman Business #2 Scholarship, Administrative on Campus Housing Scholarship.

### WORK EXPERIENCE

First Citizens Bank, Seasonal Sales and Service Representative Junior Intern, Greenville, NC, May 2024-August 2024. Consulted customers about financial needs and services at four bank branches. Informed and advised

customers on First Citizens Bank products and services. Processed a variety of banking transactions while providing excellent customer service. Answered banking questions in-person and via telephone from customers. Analyzed customers' financial needs and referred to appropriate bank specialists. Learned from and shadowed multiple bank specialists in a variety of positions. Keith Hills Golf Club, Golf Staff, Buies Creek, NC, September 2023- April 2024. Responsible for ensuring golf carts are in proper working order, clean, and ready for golfers. Maintained and closed the driving range, practice facilities, and cart barn. Scheduled tee times, enforced course rules, and assisted in maintaining pace of play. Greenville Country Club, Golf Staff, Greenville, NC, February 2023- August 2023. Responsible for the operation of both pro shop and outside activities. Assisted customers checking in for rounds, purchasing merchandise, purchasing food, and any general questions. Promoted merchandise and ensured the pro shop was properly stocked. Helped oversee a multitude of tournaments and special events while maintaining daily operations. Harris Teeter Grocery Store, Cashier, Greenville, NC, March 2022- February 2023. Scanned customers' items, and collected cash, debit, and credit payments. Distributed accurate change to customers and maintained an accurate cash drawer. Greeted customers and assisted customers in locating items. Stocked shelves and promoted store products to meet customer needs. Issued refunds, exchanges, and receipts, and addressed customer complaints and concerns.

### EXTRACURRICULAR ACTIVITIES

Lundy Fetterman School of Business: Truist Business Scholar, Scholarship Chair and Assistant Treasurer of the Sigma-Phi Chapter of Kappa Sigma Fraternity. Boy Scouts of America, Troop 30, Eagle Scout (Project benefitting American Legion Post 39). Active volunteer at Christ Hope Church.

## Cole Boggs

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### EDUCATION

Campbell University, B.B.A in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2027; Deans List; Scott Ellis Merit Scholarship.

### WORK EXPERIENCE

Buffalo Wild Wings (May 2024-Present). Monitor the phone; answering any questions needed or placing orders. Handle the cash register. Maintain a high level of customer service, being the first employee to greet every customer. Lake Hickory Country Club (August 2022-August 2023). Managed the inside operations of weekly Golf tournaments. Ensured a professional appearance, and a high level of customer service when communicating with members. Oversaw opening and closing duties of the golf shop. Managed a golf cart fleet of 68 carts. Chuck e. Cheese (April 2021-August 2023). Managed the cash register. Maintained a high customer service level.

Managed closing duties of the store. Worked with birthday parties, making sure the family and all-party members were taken care of.

### EXTRACURRICULAR ACTIVITIES

Kappa Alpha Order Zeta Psi Chapter Member; Officer Number XI-Marshal (current), President of T-Shirt committee (current). FBLA. Intramural Sports. Microsoft Word and PowerPoint certified and excel proficient.

## Ethan Brooking

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2026; Overall GPA 3.72, Dean's List, Scott Ellis Merit Scholarship, Fetterman, Lewis M & Annabelle L Business #1 Scholarship, Truist Business Scholars Program, William Andrew Tullis School of Business Trust Endowment, Southeastern Trust School Trust Management Scholarship, Fetterman, Lewis M & Annabelle L Business #2 Scholarship, Jenkins, Sue Weddle & B W Memorial Scholarship, Sauls, Dr Ernest P. Business Scholarship, Stephenson, Grace White & Gilbert Thomas Scholarship.

### WORK EXPERIENCE

Summer Intern Analyst, Wells Fargo Philanthropic Division, Winston-Salem (June 2024-August 2024). Reviewed Trust Agreements for distribution and

restrictive language, researched charitable organizations to ensure compliance with government regulations, and created proper documentation for trust contracts to avoid legal complications. Delivery Expert, Dominos Pizza Inc (May 2023-Present (seasonal)) Excelled at Customer Service and building customer rapport for repeat business, had strong time management for completing tasks promptly, and adapted to changing conditions in the workplace. Assembly Team Leader, Eden Farms, (June 2020-Present (seasonal)) Assisted with inventory management, identified areas for improvement in efficiency and quality, and assisted coworkers to help better work ethic and product output.

### EXTRACURRICULAR ACTIVITIES

Mentored a Business Administration group and provided them with ways to thrive and succeed in college. Participated in the Truist Business Scholars furthering my knowledge of the business world and creating connections with classmates. Participated in Club Spikeball and attended statewide tournaments. Participated in and was the captain of several intramural sports.

## Mackenzie Campbell

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### EDUCATION

Campbell University, Trust and Wealth Management, Pre-Law, Minor in Financial Planning; Expected date of graduation: May 2026; Overall GPA: 3.62; Dean's List; Lundy Fetterman School of Business Trust Business Scholars Scholarship, Scott- Ellis Merit Scholarship, James A. Campbell Scholarship, Administrative On Campus Housing Scholarship, David & Krista Wharton UG Business Endowment, Chesnut, McNeil Trust & Wealth Management Scholarship

### WORK EXPERIENCE

Starbucks Employee from June 2023- Current, work cashier, form relationships with customers, build drinks, prepare store and inventory for each day, delegate tasks when needed to other employees, and help to train new employees. Professionally coached figure skating for the U.S Figure Skating Association operated private lessons daily, managed profit, developed schedules,

communicated with parents, and co-workers, and completed continuing learning education experiences. Coached Learn to Skate USA from years; 2018-2023. Planned classes and activities for students ranging from 3- 65. Helped students develop figure skating skills as well as the confidence to speak in front of the class by playing games like Two Truths and a Lie and icebreakers. Worked at Dogwood Concession stand operating cash register, counting money, and keeping track of inventory.

### EXTRACURRICULAR ACTIVITIES

Lundy-Fetterman Business School Business Trust Scholar, Campbell University Honors Program, Campbell University V.I.B.E Volunteer Club, Intramural Volleyball, Trust Fellows, Marketing Club, assist coaching mock trial for Lake High School, and compete in Business Ethics National Competitions..

## Maddox Capps

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### EDUCATION

Campbell University, Masters of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2026; GPA: 3.731. Presidential Honor Roll, Dean's List, Byrd, Major Sam Trust Education Scholarship. Fetterman, Lewis M & Annabelle L Business #2 Scholarship. LFSOB Faculty and Staff Endowed Scholarship.

### WORK EXPERIENCE

Intern Analyst, Wells Fargo (June 2024-August 2024). Completed annual account reviews, resolved open items, executed TMTs and TMMs. Drafted, reviewed, and completed Discretionary Action Requests for clients. Communicated with risk managers and administrators to resolve miscellaneous issues. Independent Contractor of Capps Painting & Services (June 2019-Present). Paint interior and exterior homes, stain decks and docks, pressure wash 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 the 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-October 2023). Managed eBay profile where I sold clients items. Researched market value of products to be sold and received selling price approval from the owner of the product. Once products were listed, I interacted with potential buyers and negotiated prices upon the owners approval, updated clients of sold items, and shipped items out to buyers within the mandatory shipping period.

### EXTRACURRICULAR ACTIVITIES

Campbell University Basketball Manager and Practice Player, Cars and Coffee (Car show), Guitar player.

## Aniya Caudle

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### EDUCATION

Campbell university, Master of Business Administration, BBA in Trust and Wealth Management; Expected graduation date: May 2026; Overall GPA: 3.0; Trust Management Alumni; Hale, G Fred Memorial Business Scholarship; Truist Business Scholars Program; Administrative on Campus Housing Scholarship; Scott Ellis Merit Scholarship - Junior; RA Housing Scholarship

### WORK EXPERIENCE

Community Assistant, Campbell University, August 2023-present. Fostered a safe, diverse, and inclusive living environment that promotes student success and belonging through purposeful programming, support, and community building. Retail Associate, Exxon, May 2024-present. Provide customer service by greeting customers, answering inquiries, and assisting with their needs. Handled transactions efficiently, including cash, credit, and debit card payments. Address and resolve customer

complaints and issues promptly and courteously. Assist customers with fueling their vehicles, ensuring safety protocols are followed. Manage inventory by receiving, stocking, and organizing products. Operate the cash register, process transactions, and issue receipts. Early Child Development Caretaker, Stokes Family Center, February 2023- April 2023. Provided attentive and nurturing care to children, always ensuring their safety and well-being. Supervise and engage children in age-appropriate activities, including educational games, arts and crafts, and outdoor play. Planned and implemented daily schedules and lesson plans that promote cognitive, social, and emotional development. Communicated effectively with parents and guardians, providing updates on their child's progress, behavior, and any concerns. Food Service Worker, Sonic Drive-In, March 2022- August 2023. Accurately processed customer transactions, including cash, credit, and debit card payments. Issued receipts and handled any required refunds or exchanges in accordance with company policies. Balanced the cash drawer at the beginning and end of each shift to ensure accurate accounting of all transactions. Worked collaboratively with other team members to ensure smooth operations and a cohesive work environment

### EXTRACURRICULAR ACTIVITIES

Lundy Fetterman School of Business: Business Fellows Member, Truist Scholars Member, Campbell University Community Assistant, Campbell University Tartan Leader, Black Student Association Member

## Jessica Coutts

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management Pre-Law, BBA in Marketing, BFA in Graphic Design, Minor in Financial Planning; Expected date of graduation: May 2026; Overall GPA: 3.54; Dean's List; President's List; Scott-Ellis Scholarship, Whitehead Lettie Pate Foundation Scholarship, Administrative on Campus Housing Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certificate

### WORK EXPERIENCE

H&R Block, Customer Service Professional (January 2024 - Present). Maintain accurate records and documentation of W2, 1095, 1098, and 1099. Assign tax professionals with appropriate clients. Schedule clients through AMP Appointment Manager. Communicate with colleagues through Microsoft Teams. Aid in sales of services and resolve issues or concerns with clients. Assist diverse

clientele with a variety of backgrounds and financial needs. Centro Medico Latino, Administrative Assistant (June 2023 - February 2024). Documented and reviewed patient files to ensure accuracy. Communicated with medical facilities and institutions via phone and fax for referrals, medical records, and communicable disease reports. Data entry of medical information. Knowledgeable in immigration medical examination documentation. Responsible for sealing aforementioned forms to ensure document integrity. Uploaded I-693 Forms to Epic EMR system database. Transferred patient medical profiles from Quantum360 database to Epic Database. Campbell University, Peer Mentor (August 2023 - December 2023). Created, organized, and administered lesson plans to a class comprised of 40 freshman students. Graded written assignments in an orderly manner. Presented presentations in front of students twice a week. Arranged meetings with students and aided in their transition to the university. Facilitated group activities and team building exercises. Careese Modeling Network Magazine, Head Graphic Designer and Copywriter (November 2021 - January 2023). Collaborated with colleagues to develop a plan of action for future issues to fulfill client expectations and meet deadlines. Created visually appealing layouts for magazine pages, reviewed photos, and edited copy. Managed channels through which publication was sold and promoted. Sure!, Website Manager and Graphic Designer (August 2021 - August 2022). Assessed target market and constructed promotional material with consumer base in mind. Utilized Instagram and Facebook to promote products and brand awareness. Responsible for website creation with HTML coding and design elements.

### EXTRACURRICULAR ACTIVITIES

Pineburr Yearbook: Head Graphic Designer, Criminal Justice Club: Member, Campbell University Residence Life and Housing: Graphic Designer, Mount Harmony Baptist Church: Nursery Worker, Martin Luther King Middle School: Sports Physical Assistant

## Raelynn Cox

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A in Trust and Wealth Management, Pre-Law, Minor in Financial Planning: Expected date of graduation: May 2027; GPA: 4.0. Scott Ellis Merit Scholarship, James A. Campbell Scholarship, Caton A. & Linda Shermer Scholarship, Robert J. Murtagh Business Scholarship, Administrative On Campus Housing Scholarship, Wells Fargo Trust and Wealth Management Scholarship, North Carolina Extension & Community Association Scholarship, School of Business Student Body Scholarship, Ponzer Ruritan Club Educational Scholarship, Hyde County Farm Bureau Federation Scholarship, and Beaufort County Community

### WORK EXPERIENCE

Ribeyes Steakhouse Server (May 2024 – August 2024). Delivered exceptional customer service in high-pressure restaurant settings. Cultivated positive dining experiences for guests as a server. Effectively addressed customer service concerns. Harris' Steak and Seafood House Server, Cashier, and Dishwasher (June 2019 - June 2023). Took accurate food and drink orders, made recommendations, and accommodated requests. Handled cash, credit cards and other payment transactions precisely as a cashier. Counted transactions accurately at the start and end of shifts to ensure precise transactions. Supported smooth operations by washing dishes, glassware, and kitchen equipment. Followed all sanitation regulations in cleaning dishes, utensils, and preparation equipment. Hyde County Hotline Spring Intern (March 2022 - June 2022). Provided advocacy and support for women residing in a domestic abuse shelter, including helping develop financial plans and transportation assistance. Supported operations of an affiliated thrift store benefiting the shelter through tasks such as organizing inventory. Assisted shelter residents with job search efforts by providing childcare so women could focus on applications and interviews. Built trust with shelter residents through guidance and reliable presence, enabling women to voice concerns and seek help.

### EXTRACURRICULAR ACTIVITIES

Truist Business Scholar: Member and Outreach Ambassador, Trust Fellow: Member, LeadFirst: Member, Peer Mentor, Phi Kappa Phi Honor Society: Member

## Abigail Croom

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### EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management Pre-Law, Minor in Financial Planning. Expected Date of Graduation: May 2026; GPA: 3.796. President's List (Fall 2023 – Summer 2024), Dean's List (Fall 2022-Summer 2023), Lettie Pate Whitehead Foundation Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, Administrative On-Campus Housing Scholarship, Scott Ellis Merit Scholarship, North Carolina Need Based Scholarship, Campbell University Need Based Grant, Luther H. Butler NC Baptist Scholarship. Certification: Truist Emerging Leaders Certification

### WORK EXPERIENCE

Advocacy Trust; Trust Administration Intern, Mooresville, North Carolina (May 2024 – Present). Gained specialized knowledge in the practice of managing and administering Special Needs Trusts and Settlement Protection Trusts.

Conducted research and analysis on trust documents, estate plans, and beneficiary requests to support Trust Officers and Trust Administrators. Organized documentation to perform trust account reviews, audits, and necessary accountings. Completed annual account reviews. Processed trust account distributions of up to \$10,000 in accordance with trust provisions using various systems, including M-Files, SunGard AddVantage, and Alloy software. Collaborated with trust officers to develop and implement strategies for optimal cash flow and growth of accounts. Gained exposure to fiduciary responsibilities and hands-on experience in financial planning, risk management, and estate planning services. Mitigated risk by conducting federal safety research on vendors and beneficiaries to ensure safety of financial disclosures. Fostered team building skills through intern development programs that provided management advisement to interns across The Forge Companies. Campbell University Office of Alumni Engagement; Annual Giving Student Worker, Buies Creek, North Carolina (March 2024 – Present). Assisted faculty with various year-round tasks involving alumni outreach and engagement. Broadcasted the annual Thank-A-Giver (TAG) Day across campus by tabling and arranging various signage to promote building strong community with donors. Utilized video technology each month to personally thank first-time donors for their generosity. Performed cold calls for annual gifting Phone-a-thons. Brown Dog Coffee Company; Team Lead Barista, Burgaw, North Carolina (December 2020 – December 2023). 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. 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.

## EXTRACURRICULAR ACTIVITIES

Executive Treasurer for Campbell University's Student Government Association (SGA), Judicial Board Chairwoman of The Alpha Xi Chapter of Sigma Alpha Omega National Christian Sorority, Member of The Camel Chapter of Ducks Unlimited, Chaplain for Campbell University College Republicans, Forest Hills Baptist Church Choir Member, Intramural Sports, Calligraphy, Proficient in SunGard AddVantage, Proficient in Microsoft Office Suite Technology.

## Kara Daniels

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### EDUCATION

Campbell University, Bachelor of Business Administration in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: December 2025; Overall GPA: 3.806; Dean's List; School of Business Student Body Scholarship; Scott Ellis Merit Scholarship; Administrative On Campus Housing Scholarship

### WORK EXPERIENCE

Wells Fargo, Special Needs Trust Services, Austin, TX, Intern Analyst; June 2024 – August 2024. Conducted a comprehensive review of Texas 142/867 Trust documents to identify termination language and compiled data into a detailed spreadsheet. Analyzed Texas trust accounts to determine the presence of a guardian of the person, where applicable. Reviewed and evaluated clients annual budgets, proposing optimized budgets based on expense reports. Managed and maintained an EFTPS enrollment tracking spreadsheet; prepared and sent client letters and forms for signatures, ensuring accurate filing upon return. Implemented optional code changes and updated corresponding memos in alignment with regulatory requirements. Facilitated the setup of direct deposit for annuities, utilizing checks for tracking, and completed forms for submission to annuity companies. Completed AARs. Life Solutions of Eastern North Carolina, New Bern, NC, Summer Intern, June 2023 – August 2023. Maintained bank reconciliation, credit card reconciliation, and statement requirements to ensure accuracy, integrity, and compliance for various trust and wealth management clients. Assisted in verifying invoice accuracy and payment approvals, and mailed checks to various vendors as assigned. Updated and maintained the financial filing system for trust and wealth management clientele. Managed all mailing and shipping needs, office supplies, and ensured top-level client service through various client outreach projects. Mary Cheatham King Real Estate, Morehead, NC, Receptionist, August 2022 – December 2023. Answered phones on weekends and routed incoming prospective clients to various agents. Prepared and mailed various client correspondence. Input client data into Brivity software for various agents. Interacted with prospective clients, providing information on various listings prior to routing calls to an agent.

### EXTRACURRICULAR ACTIVITIES

Trust Fellows Member, Lundy Fetterman School of Business Peer Mentor, Student Government Association Representative (2023), Eller Ethics Case Competition Participant (2023), Creek Freaks Member, Campbell University Equestrian Team Member.

## Mckenna Duncan

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2026; Planning to work towards a Master of Business Administration. Trust and Wealth Management Honor Society (August 2022 - Present) Scott Ellis Merit Scholarship (4 year recipient), Women's Lacrosse Scholarship (4 year recipient), Big South Commissioner's Academic Honor Roll 2023. CAA Commissioner's Academic Honor Roll 2024. Graduated from The McDonogh School, Owings Mills MD, 2022.

### WORK EXPERIENCE

Campbell University Student-Athlete, Buies Creek, NC (August 2022 - Present). Safe Harbor Marina, Dockhand, Oxford, MD (May 2021 - August 2021). OC Fuel Dockhand, Ocean City, MD (May 2022 - August 2022). Assisted customers with fuel, pump out, and services at the fuel dock, docking assistance responded to VHF hails, made reservations, ran register, and assisted guests. Matt's Fish Camp Restaurant, Server, Fenwick Island DE (May 2023 - August 2023 and May 2024 - August 2024). Provided customers with excellent service ensuring their restaurant experience was memorable. Understood team dynamics and how to handle different personalities in a fast-paced environment. Able to manage conflict, prioritization, and ability to adapt. Constantly met the key performance indicators (KPIs) established prior to each shift. A few of the transferable skills learned from being a student-athlete and work experience are teamwork, communication, multitasking, patience, managing conflict as well and stress management.

### EXTRACURRICULAR ACTIVITIES

NCAA Division 1 Athlete, Campbell University Women's Lacrosse Team, Attack (August 2022 - Present). member of Army ROTC (August 2022 - May 2023). Youth Lacrosse Coach, Dark Horse Girls Lacrosse (May 2023-July 2024).

## Conover Gall

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Accounting, Minor in Finance; Expected date of graduation: May, 2026; Scott-Ellis Scholarship, Administrative on Campus Housing Scholarship. Cape Fear Community College, Associate in Arts; Date of graduation: May, 2024: GPA: 3.68; President's List.

### WORK EXPERIENCE

Food Lion LLC, Wallace, NC, Produce Associate, June, 2022 - June, 2024; worked 28-hours weekly while attending Cape Fear Community College full time. Responsible for proper product handling and storage, stocking, equipment operation, ensuring safety standards, building displays, product rotation according to company guidelines and providing customers with support.

### EXTRACURRICULAR ACTIVITIES

Varsity Basketball, Wilmington Christian Academy 2019 - 2022; Coaches Award. First-Degree Black Belt, Taekwondo; US Eastern Regional placements in Forms and Sparring. Pierce Memorial Presbyterian Church, Farmingdale, NJ: member. Wallace Presbyterian Church, Wallace, NC: member. Campbell University Investment and Finance Club; Club Sports, Basketball.

## Jayden Giles

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2026; Overall GPA 3.52; Dean's List; Gordon B. Rowland Trust Scholarship, Scott Ellis Transfer Scholarship, James L. White FBLA scholarship.

### WORK EXPERIENCE

Carlie C's IGA, Meat Department Clerk, Coats, NC, Part Time Job; May 2023-Present. In charge of pricing and reducing meat based on quality of the product. Prepping meat to be cut or traying meat after it was cut. Organizing all items in department for neatness. Cleaning the meat department when co-workers finished cutting. Fulfilling any needs of customers to their satisfaction. Triton High School, Football Coach, Erwin, NC, Paid Volunteer; June 2023-Present. Coaching and mentoring JV and Varsity Offense Line. Focused on teaching technique and developing players. Coached the group of young men at

practice and on game days. In charge of grading them after their performance in games and finding ways to help them correct their mistakes. Stewart Farms, Farm Hand, Benson, NC, Part Time Job; May 2024-August 2024. In charge of cutting all the grass on the farm. Maintenance work such as painting wooden fences and repairing any damaged fences. Feeding and watering the cattle. First Rate Roofing, Salesman and Inspector, Raliegh, NC, Part Time Job; December 2023-March 2024. Traveled inspecting possible customers who had roof issues and would connect them to my Project Manager to close the sale. Fulfilled duties of door knocking sales in neighborhoods. Once booked with the company I would inspect the attic and roof and give an estimate to the client. NC Wesleyan University Student Athlete, Rocky Mount, Football Player; August 2022-May 2023. Carlie C's IGA, Bagger, Coats, NC, Part Time Job; August 2020-August 2022. In charge of filling needed items on the sales floor. Cleaning the entire store. Putting displays together and organizing endcaps. Bagging and helping customers with any request or needs they have. Some maintenance work of the store.

### EXTRACURRICULAR ACTIVITIES

Lundy Fetterman of Business: Trust Fellows member, FBLA (high school): member

## Christian Gilmore

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### EDUCATION

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

### WORK EXPERIENCE

Group x Fitness Workout Instructor (August 2024 - Present) In this job, I demonstrate how to do various amounts of full-body dynamic workouts; to improve posture, flexibility, body strength, and balance. Digital Media Student Worker (August 2024 - Present) I assist all CAA sports with live camera footage and behind the scenes action; Including recording, audio, graphics, producing, directing, and sideline reporting, for viewers streaming games virtually. Planet Fitness Member Services Representative (July 2024 - Present) Responsible

for providing exceptional customer service, ensuring a clean and welcoming environment, and supporting daily gym operations. Campbell University Residence Life Community Assistant (August 2023 - Present) For this job, I'm responsible for creating a safe, inclusive, and supportive living environment for students in my residence hall. My key duties include enforcing university policies, organizing social and educational events, and serving as a resource for students. I also address conflicts, and handle emergencies; using strong leadership, communication, and problem-solving skills! Special Needs Caregiver (February 2020 - Present) Here, I provide in-home personal care for a 20-year-old woman with developmental and intellectual disabilities. My responsibilities include assisting with daily activities such as personal hygiene, meal preparation, medication administration, and mobility. Also, I help monitor her health and behavior, while ensuring a safe-nurturing environment. Summer Lifeguard (April 2020 – August 2023) My main responsibilities include ensuring the safety of swimmers and guests in/on the pool deck. My key duties include monitoring water activities, enforcing safety rules, and responding quickly to emergencies such as rescues or first aid situations. I also inspect and maintain safety equipment, perform water rescues, and provide basic first aid or CPR when needed. Family Babysitter (January 2017 - Current) During this job, my responsibilities include maintaining care for children by ensuring their safety, preparing meals, changing diapers, and engaging them in activities. I follow their parents guidelines, and assist with homework or bedtime routines, while maintaining a clean environment.

### EXTRACURRICULAR ACTIVITIES

Women's Club Volleyball. 10 & Under Cheer Coach. SAVVI Brand Ambassador. Organized & Assisted Missions Trips & Service Projects in Guayaquil, Ecuador, and the Church of God Children's home in Concord, NC. Student Government Vice-President (hs). Gigi's Playhouse Volunteer.

## Landon Green

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### EDUCATION

Graduated from the Governor's School of Southside Virginia; received Associates of Arts and Sciences in General Studies from Southside Virginia Community College in May 2023. Currently enrolled at Campbell University, Master of Business Administration (proposed applicant); BBA in Trust and Wealth Management, Minor in Financial Planning; Honors College participant; Expected date of graduation May 2027. Overall GPA: 3.912. Included on Dean's List and President's List. Completed Campbell Study Abroad program in Germany, Summer of 2024. Received the following scholarships: Scott Ellis Merit Scholarship; James A. Campbell Scholarship; F. Christian Zinkhan Business Endowment; Southeastern Trust School Trust Management Scholarship; Truist Business Scholars Program; Charles D. "Skip" Fox IV School of Business Trust Scholar; Lewis M. & Annabell L. Fetterman Business #2 Scholarship; Clarksville Ruritan Club Scholarship (consecutive year recipient); Administrative On-Campus Housing Scholarship.

### EXTRACURRICULAR ACTIVITIES

Truist Business Scholar member, Campbell Trust Fellow, Phi Theta Kappa member; Phi Kappa Phi member; Lundy-Fetterman School of Business New Student Forum mentor; Campbell University Residential Learning Community: Honors peer mentor; Astronomy Club member

## Richard Hager

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### EDUCATION

BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: Spring 2026; Overall GPA: 3.55; Dean's List; President's List; Scott-Ellis Scholarship, Truist Business Scholar, Dr. Ernest P. Sauls Business Scholarship, Southeastern Trust School Trust Management Scholarship, Fred G. Hale Memorial Business Scholarship, Harry T. Gattton Trust Scholarship

### WORK EXPERIENCE

Trust Advisors Institute, ATFA Certification Course, Buies Creek, NC, Student Intern; June 2024. Assisted a cohort of professionals studying for the ATFA. I ensured their needs were met and made myself available to the attendees from the start of their day until the evening. This opportunity also allowed me to sit in on the ATFA course and gain exposure to materials concerning fiduciary principles, investments, estate planning, compliance,

Subsection J, and more. Office Depot, Office Supply Store, Sanford, NC, Store Associate; July 2024-Present. Sales associate, Cashier, inventory, customer service, public relations, furniture assembly. YMCA of the Triangle, swimming pool, Lifeguard & Youth Swim Instructor; June 2022-July 2024. Certified in lifeguarding, Emergency Oxygen, Automated External Defibrillator (AED), First Aid, and CPR. I served my community by working at my local YMCA from my junior year of high school to the summer of my freshman year of college. Would plan and teach a 6-week swimming instruction class for 3-5-year-olds. Additionally, was put in charge of facilitating the Delta Grant, which was an effort the pool committed to in the Summer of 2023 to provide free water safety training for community children.

### EXTRACURRICULAR ACTIVITIES

Lundy Fetterman School of Business: Trust Fellow, Finance Club, 1 st place at the Templeton Ethics Case Competition 2024, Spoke and presented at Triton High School on behalf of Truist Business Scholars, panelist; LFSB accepted students' day. Campbell University: Student Government Association, Freshman Class Representative, Campus Pantry Volunteer

## Jonathan Hill

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, Expected date of graduation: December 2026, GPA: 3.47, Deans List; Scott Ellis Merit Scholarship, Fetterman, Lewis M & Annabelle L Business #2 Scholarship, Lawrence, Peggy R Scholarship, and the Residence Life Scholarship.

### WORK EXPERIENCE

Work experience includes a role as a Personal Trust Intern Analyst at Wells Fargo in Long Beach, CA, from June 2024 to August 2024. Responsibilities involved overseeing trust and agency accounts with market values up to \$50 million, conducting administrative account reviews, and closing numerous open items. Duties also included reviewing trust, IRA, and agency accounts for compliance with federal regulations, actively communicating with Relationship Managers to gather necessary account information, and gaining proficiency in financial systems such as Trust Gateway, Navigator, SEI, and ClientLink. Additionally, shadowed relationship managers to observe daily operations. Since August 2022, served as a Sales Team Member at Sheetz #418 in Trinity, North Carolina. Key responsibilities include providing exceptional customer service, operating the POS system, maintaining store cleanliness and organization, managing inventory, promoting store promotions, and resolving customer complaints. Also collaborated with team members to ensure smooth store operations and adhered to company policies, including cash handling and security protocols.

### EXTRACURRICULAR ACTIVITIES

Achievements include earning the rank of Eagle Scout and serving as President and Captain of the Club Soccer team. Involvement extends to being a member of the National Beta Club and cofounding the student organization V.I.B.E.

## Logan Ladue

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### EDUCATION

Campbell University, M.B.A., B.B.A. in Trust and Wealth Management Pre-Law, Minor in Financial Planning, expected date of graduation: May 2026; GPA: 3.921, President's List Spring 2024, Dean's List Fall 2023, Scott Ellis Transfer Scholarship, North Carolina Need Based Scholarship, Admin VP Scholarship, Becky T. Kelly Trust Management Scholarship. Central Piedmont Community College, A.A. in Business Administration, date of graduation: July 2023; GPA: 3.822, President's List Fall 2022, Dean's List Spring 2023, Levine Scholarship.

### WORK EXPERIENCE

Intern Analyst for Wells Fargo Trust Client & Advisor Services (Winston-Salem, NC, June 2024 – August 2024). Assisted the center owned personal trust administration teams by performing administrative account reviews. This process required the interpretation

of over a hundred various trust documents and focused on the administration of irrevocable trust accounts. Closed open items that resulted from administrative account reviews, which often included tasks such as system coding updates, writing memo ticklers, requesting change approvals, submitting client information updates, making FITSA form corrections, sending out mailings, and imaging. Submitted discretionary distribution requests in the DARS system. This involved detailed write-ups, depletion analysis calculations, annual budget authentication, supporting documentation packets, and requesting proposed approval recommendations. Developed proficiency and familiarity with SEI, Trust Gateway, Trust Navigator, FileNet, ImageView, Fiduciary Client Correspondence, 3TMOX, DARS, MSFee Reporting, WealthNet, SharePoint Procedures, Task Management Tool, Trust Money Movement, and Accurint. Owner & Head Trainer for A Knight's K9 Dog Training (Waxhaw, NC, December 2019 – August 2023). Conducted in-person and digital sales with over three hundred clients. Managed an online presence in the form of SEO utilization, lead-generating platforms (Rover, Wag, Bark, etc.), social media platforms, and 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. 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 methods to lead them towards training success in the future.

### EXTRACURRICULAR ACTIVITIES

Campbell University Ministry; Small Groups Bible Study Leader, YoungLife Union County; Volunteer Leader for Parkwood High School, Just Another Sport Dog PSA Club; Team Member, Competitor, Decoy/Helper. Additional Hobbies: Archery, Bass Guitar, Brazilian Jiu-Jitsu, Chess, Taekwondo, Powerlifting.

## Bryson Lee

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### EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2026; Cumulative GPA: 3.767. President's List, Dean's List, Truist Emerging Leaders Certification, Scott Ellis Merit Based Scholarship, Dr. Ernest P. Sauls Business Scholarship, Marvin Drake Johnson Trust Management Scholarship, Mary Paschal Trust Management Scholarship, Major Sam Byrd Trust Education Scholarship, Carlton & Lynell Business Scholarship, First Citizens Bank Scholarship (outside scholarship)

### WORK EXPERIENCE

State Employees' Credit Union, Raleigh, NC, Trust Services Intern, May 2024 – Present Examined members estate planning worksheets completed by Trust Representatives to determine fiduciary roles, and to determine eligibility to fit into SECU's Estate Planning

Essentials Program. Scheduled Estate Planning Essentials appointments for members. Prepared Discretionary Distribution Reviews for Trust Officers to be presented to the Trust Committee. Completed account synoptics and initial due diligence of potential new accounts. 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. Provided emotional support to families after a loved one has passed. Created playlists and background multimedia for funeral services. Greeting clients and attendees with compassion while also giving directions and instructions related to the funeral service. Developed proficiency in dealing with emotionally distressed people.

### EXTRACURRICULAR ACTIVITIES

Member of Campbell University Trust Fellows, Golfing, Cooking, Banner Chapel Advent Christian Church Member and Volunteer

## Charles Lewis

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### EDUCATION

Campbell University, Bachelor of Business Administration (B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected Graduation May 2026; Scott Ellis Merit scholarship, Administrative on Campus Housing Scholarship.

### WORK EXPERIENCE

Walmart, Personal Shopper, Rock Hill, SC (May 2024-Present). Organized orders into designated totes and later placed onto dollies based upon pickup or delivery. Balanced taking out orders to customers who had arrived for their orders and answering phones for customers who would be arriving soon. Assisted managers with keeping a 3-minute delivery of all orders to the customer upon arrival. Papa Murphys, Crew, Rock Hill, SC (March 2022-August 2023). Would prepare ingredients for the day to come, greeted walk in and calling customers, received and placed inbound orders from customers,

entertained customers while making their pizza, washed dishes, cleaned the restaurant by sweeping, moping, and taking the trash out when needed, and balance the till when leaving or closing the store. Ann Springs Close Greenway, Camp Counselor Fort Mill, SC (May 2021-August 2021). Would welcome campers, planed and facilitated events, responsible for the care of 10-15 children.

### EXTRACURRICULAR ACTIVITIES

Boy Scouts Of America Troop 925: Eagle Scout, Campbell University Club Soccer, Fishing, Camping.

## Luke Magee

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### EDUCATION

Campbell University BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: December 2026; Overall GPA 3.41. Deans List, Truist Business Scholar, Trust Fellows, Scott Elis Merit Scholarship, James A. Campbell Scholarship, Residence Life Scholarship, Truist Business Scholars Scholarship, Mostashari, Kazam, & Talat Business Scholarship, Jean L Jones LFSOB Trust Education Endowment.

### WORK EXPERIENCE

East Coast Waterfowl, General Manager, Willow Springs, North Carolina, June 2024 – Present. Ran QuickBooks accounting software for the company. Managed all accounts receivable and payable. Made sure there was adequate money for payroll. Ordered products to complete orders we received. Made sure production of orders moved along in timely process. Met with small

business consultants to go over company issues and areas of improvement. Updated online scheduler and scheduled task for other employees. Updated website and added product descriptions and tags. Formulated business plans and made-up job descriptions for all employees. Formulated budgets and made sure the company adhered to them. Had weekly cash flow meetings with owner. Campbell University Trust education Foundation May 2024-June 2024. Assisted students with any needs while attending classes. Helped set up and breakdown classrooms. Attended all events and classes with them. Attentively listened in the classes to gain knowledge of advanced fiduciary principles. East Coast Waterfowl, Production Specialist, October 2023- June 2024. Made custom hats and shirts. Completed orders in a timely manner. Packaged and shipped out orders. 919 Junk Removal, March 2021-Present, Holly Springs, North Carolina. Owned and operator small business throughout high school. Advertised to acquire customers. Met with potential clients and gave them quotes on jobs they needed completed.

### EXTRACURRICULAR ACTIVITIES

Active member of Truist Business scholars. I have attended trips and participated in student outreach events with the scholars group throughout my time at Campbell. I am also a member of the Trust Fellow with Professor Witherspoon. I attended weekly meetings with trust alumni every week throughout my first semester at Campbell where I built many valuable connections. Also a member of the Camel Chapter ducks unlimited where we help raise money for wetland conservation. I have participated in many intermural sports while at Campbell but spent the majority of my time competing in the intermural pickleball and basketball.

## Sean McDowell

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management Pre-law; Expected date of graduation: May 2026. Scott-Ellis Merit Scholarship, Administrative on Campus Housing Scholarship.

### WORK EXPERIENCE

Olive Garden Server (May 2024-Present). Provide service to customers, worked in a team-based environment, satisfied any needs of customers as well as staying composed in different scenarios. Fresh Local Ice Cream (April 2023-August 2023). Work duties included greeting and assisting customers, opening and closing the store, serving ice cream. Pet Paradise Playtime Coordinator (March 2020-May 2020). Organized play schedules for large groups of dogs, studied various types of dog behavior, and acted in cases of emergency. Pet Paradise Management Team (May 2020-April 2021).

Customer Service Representative, supervised a staff of thirty, ensured employees met requirements for their shift, distributed medications for dogs, managed financial transactions, created schedules for employees, managed supply orders for store. Butchers Market (June 2020-August 2020). Assist customers with sales, handle financial transactions for customers as well.

### EXTRACURRICULAR ACTIVITIES

Philanthropy Chairman of the Kappa Sigma Fraternity North Carolina Sigma Phi Chapter, Fundraising Chairman of the Kappa Sigma Fraternity North Carolina Sigma Phi Chapter, Intramural Sports, Miracle League of the Triangle Volunteer.

## Steven Mirabile

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### EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, expected date of graduation: May 2026; GPA: 3.625, Rowland, Gordon B Trust Scholarship, Hale, G Fred Memorial Business Scholarship, Truist Business Scholars Program Scholarship, Administrative on Campus Housing Scholarship, Campbell Football, Campbell University Student Athlete Advisory Committee, Truist Leadership Institute Emerging Leaders Certification

### WORK EXPERIENCE

Campbell University Student-Athlete (July 2022-Present). Summer Intern Analyst (2024) with Wells Fargo Bank, Trust Client & Advisor Services Family Office, Minneapolis MN. Assisted in day-to-day duties of trust administration. Assisted in AARs, DARS, New Account Checklist, and various account management projects. Reviewed and comprehended legal documents and specific trust language. Trust Education Foundation Trust Advisors 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.

## Davis Neff

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant) B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected Date of Graduation May 2026; GPA: 3.505. Dean's List; President's List; Scott Ellis Merit Based Scholarship, Administrative On Campus Housing Scholarship, Men's Baseball T&F Scholarship, Benjamin M. Hawkins Trust Scholarship

### WORK EXPERIENCE

Music Instructor, Cleveland High School, Clayton, NC (August 2024 - Present) Duties include teaching breathing techniques and brass fundamentals, running sectionals, assisting with full ensemble rehearsals. Head Visual Instructor, Northwood High School, Pittsboro, NC (August 2022 - Present). Instruct students on leadership and learning skills while simultaneously assisting the marching band build as a group. Have led the band to

multiple first place trophies in statewide competitions over the course of the marching season. Shift Leader, Marco's Pizza (November 2018 - February 2021). Conducted operations throughout the course of the day including, but not limited to, food preparation, food orders, delivery routing, along with customer complaints and resolutions. Responsible for managing employees and upholding company standards during all hours of operation. Was entrusted with management of cash registers and store safes with the duty to balance out cash in/outflow each night before closing and securing the store at the end of the business day. Chatham County Parks and Recreation, Employee and Summer Camp Counselor, Pittsboro, NC (August 2018 - October 2019). Assisted with summer evening programs, weekend public events, and community holiday celebrations. Mentored children ranging from 4 to 14 years of age over the course of the summer. Organized team building events with the campers and other camp counselors in order to build a strong sense of direction for the counties' program moving forward.

### EXTRACURRICULAR ACTIVITIES

Carolina Crown Drum and Bugle Corps Member, Campbell University Men's Baseball Manager, Campbell University Track and Field Manager, Sound of the Sandhills Marching Band, Campbell University Wind Ensemble

## Grace Newby

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### EDUCATION

Campbell University, B.B.A in Trust and Wealth Management Pre-Law (4+1 Program with MBA); Minors in Financial Planning and Sport Management; Expected date of graduation: May 2026; GPA: 3.354. Dean's List Fall 2022 & Spring 2024, Scott Ellis Merit Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, Lettie Pate Foundation Scholarship, Men's Basketball T&F Scholarship.

### WORK EXPERIENCE

Trust Planning Intern for State Employees' Credit Union in Downtown Raleigh (May 2024- Present). Work included reviewing estate planning worksheets, keying estate planning appointments through the Estate Planning Essentials Program. Assisted Trust Officers on completing Designated Distribution Requests and Depletion Analysis to present to TAC. Reviewed documents drafted by attorneys to interpret and analyzed them. Organized accounts and participated in weekly Trust Planning/Compliance and Trust Company meetings. 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; President

## Matthew Pennington

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### EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected Date of Graduation: May 2026; Scott Ellis Merit Scholarship; Administrative on Campus Housing Scholarship; North Carolina Need Based Scholarship

### WORK EXPERIENCE

Electrical Apprentice with Bobby Wilson Electrical (May 2023-August 2024). Involved troubleshooting and diagnosing electrical problems. Proven help of assisting senior electricians in completing tasks efficiently and accurately in fast-paced environments. Maintaining composure under pressure while assuring all tasks are completed on time. Keith Hills Golf Club Pro Shop Attendant (October 2022-May 2023). Performs customer service and administrative work. Responsible for sale of pro shop items, collections of fees, registration of players, and assigning tee times. Worked under the supervision of

the Assistant Golf Professional and indirect supervision of the Golf Professional. Subway Sandwich Artist (December 2021-August 2022). Provided exceptional customer service with consumables. Efficiently assisted with customer needs and any changes needed to food. Accurately take orders and prepare sandwiches.

### EXTRACURRICULAR ACTIVITIES

Kappa Alpha Order Zeta Psi Chapter Member: Leader of the rush committee (Present), Member of social chair (Present), Operation K.A.R.E: Raised \$700, Future Business Leaders of America, Excel, Word, PowerPoint Proficient, Club Baseball, Intramural sports

## James Peterson

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2028, Piedmont Community College, Associate in the Arts; Scott-Ellis Scholarship, Rockie Stuart Scholarship

### WORK EXPERIENCE

Butcher's Daughter Market & Deli, Roxboro, NC, Deli Worker; March 2023- August 2024. Made sandwiches, sliced deli meats and cheeses, packaged steaks/seafood, helped take elderly customers orders to their car. Mill Creek Golf Course, Mebane, NC; April 2022-Present. Put carts out in front of the pro shop, put customers clubs on the golf carts, cleaned the golf carts, tournament set up, cleaning the driving/chipping range, putting water out on the course, making sure the sand bottles on carts and par 3's are filled, blowing off the patio/ porch to the Pro Shop, changing the oil to the pressure washing, putting

gas in the pressure washer/golf ball picker, unclogging the ball machine, wash/fold towels, occasionally dealing with some Pro Shop issues. Peterson's Lawn Service Inc., Dunn, NC, Go getter; June 2022. Cleaning trash off of job sites and digging trenches.

### EXTRACURRICULAR ACTIVITIES

Lundy Fetterman School of Business: Trust Fellows member, Lundy Fetterman School of Business: Finance and Investing club

## Hayden Phaturos

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### EDUCATION

Campbell University, M.B.A (proposed applicant), B.B.A in Trust and Wealth Management, Minor in Financial Planning; Expected Date of Graduation: May 2026 GPA: 3.063; Men's Wrestling Housing Scholarship; Scott Ellis Merit Scholarship; Men's Wrestling Scholarship

### WORK EXPERIENCE

Worked in Fruition Smoothie Shop (April 2022-July 2022). Washed dishes and put them away. Made fruit smoothies, fruit bowls, coffees, and a variety of toasts. Worked well with other coworkers. Would interact with customers daily ensuring them a happy experience at Fruition. Would always offer to carry the heavy boxes of fruit, bowls, cups etc. down into the basement so my coworkers would not have to. Would close shop ensuring that all the items were put properly back into place, the shop was clean, and locked. Work for Phil Loves Bears

(July 2024- Present). Stuff and seal teddy bears with cotton for children. Package the bears into boxes. Clean the warehouse of the cotton or trash on the floor from working on the bears. Unload and load trucks full of boxes with packaged bears.

### EXTRACURRICULAR ACTIVITIES

Campbell Wrestling Team; Member, Liberty High School Wrestling Team; Volunteer Coach

## Sadler Powell

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant), BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2027; Overall GPA: 3.228; Scott Ellis Merit Scholarship University of Mount Olive, Dual enrolled as an aviation student as a non-degree seeking student (January 2023-May 2024), Obtained Instrument and Commercial Pilot's License from UMO

### WORK EXPERIENCE

Fellowship of Christians in Universities and Schools (FOCUS), Associate Field Staff, Raleigh, NC, (August 2024-Present). FOCUS is a Christian ministry organization for Middle School and High School students. Lead and assist with high school and middle school meetings per week. Attend games and visit students in Raleigh. Plan lunches and various other events with students from Raleigh. Assist with administrative tasks. FOCUS Summer Field Staff, Raleigh, NC, (June 2024-Aug. 2024). Worked as a summer intern and led and assisted summer camps. Planned events with students in Raleigh. Events ranged from lunches with students to all area events. Helped with administrative tasks. Harnett County Regional Jetport, Lillington, NC, (October 2023-Present). Worked as a line technician. Refueled various types of airplanes and helicopters. Airplanes varied from jets to prop planes. Maintained airport safety and airport maintenance. Performed Quality Control tests on both Aviation gas and Jet fuel. NC Smarthome, Raleigh, NC, (July 2021-August 2023). Worked as a technician to install various different Audio and Visual Equipment. Mainly installed Cameras, TVs, Speakers, Access Control, and smart home systems like Control4. Worked with customers to adjust, and make changes as needed to their systems. Serviced equipment as needed. Pope's Dry Cleaners, Raleigh, NC, (August 2019-July 2021). Sorted and tagged clothes based on dry cleaning needs of individual clothes and customer requests. Managed phone calls, customers including customer complaints, and cleaning. Computed earnings at the end of each shift along with sorting money.

### EXTRACURRICULAR ACTIVITIES

Commercial Pilot (Airplane Single and Multi-Engine Land), FAA Part 107 Commercial Remote Pilot, Treasurer of the Sigma Phi Chapter of the Kappa Sigma Fraternity, Former Assistant Treasurer and Community Service Chair, Managing Two Personal Investment Accounts, Intramural Sports

## Jaidyn Ramsey

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### EDUCATION

Campbell University, Master of Business Administration (proposed applicant) B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 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.

## Tyler Renken

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### EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2027; GPA: 4.00. Scott-Ellis Transfer Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, North Carolina Need Based Scholarship, Campbell University Need Based Grant. Central Carolina Community College, Diploma, Automotive Restoration Technology, Graduated with Honors August 2023. Hawkeye Community College, Associate of Business Administration, Graduated May 2018.

### WORK EXPERIENCE

United States Army, Combat Medic (68W) (September 2018 - September 2022) Acted as Senior medic and took responsibility for the medical readiness of 130 soldiers. Was a team leader and took responsibility for scene and unit management to maximize support of patients. Trained

new medics and personnel on proper medical techniques, procedures, and protocols to maintain best TCCC practices. Recognized and treated medical conditions following TCCC guidelines. Worked in a team to accomplish a variety of different tasks associated with the goal to complete a broader goal. Responsible for \$200,000 worth of medical assets including vehicles and equipment. Transporter Werks, Fabrication Technician (January 2023 - June 2023). Fabricated custom components and structures following customer requirements. Assembled and welded components to create metal parts. Measured parts using various tools to confirm adherence to quality standards on final inspections. Used a variety of machines and equipment accurately and efficiently. Collaborated with team members to solve problems and complete projects. Rust Reviver, Automotive Restorer (July 2023 - August 2023). Specialized in sheet metal fabrication and repairs. Applied automotive paint and finishing techniques to parts and panels. Experienced troubleshooting electrical and mechanical systems and components. Repaired and replaced worn and damaged components. Maintained shop facilities and equipment for maintenance, repairs and safety. Nooge Customs, Automotive Fabricator (August 2023 - March 2024). Specialized in custom sheet metal fabrication. Worked in a team to solve unique and complex problems involving automotive fabrication. Learned CAD to produce custom materials using a plasma table. Wired electrical components effectively. Maintained shop safety, equipment, and facility standards.

### EXTRACURRICULAR ACTIVITIES

Vice President of Financial Records for Campbell University Future Business Leaders of America Club, Member of Campbell University Trust Fellows, Member of Campbell University Finance and Investing Club, Automotive Restorer and Enthusiast, Sanford Car News Event Staff member, Central Carolina Community College Automotive Restoration Event Staff Member, Proficient in Microsoft Word, Excel, PowerPoint, and Google Docs.

## Zachary Rine

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### EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected date graduation: May 2026; GPA: 3.207. Scott-Ellis Scholarship; Wiggins, Guyler, Harry John Business Scholarship; Scarborough, Todd R & Elva Trust Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certificate. Actively preparing for the Securities Industry Essentials (SIE) exam.

### 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

Recruitment Chair and member of the Phi Delta Theta Fraternity North Carolina Zeta Chapter, Philanthropic supporter of Live Like Lou Foundation: Eagle Scout, Boy Scouts of America Troop 198, Intramural Sports

## Grant Spangler

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### EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2026. Administrative on Campus Housing Scholarship, Scott Ellis Merit Scholarship, Campbell University's Dr. Ernest P. Sauls Business Scholarship.

### WORK EXPERIENCE

Campbell University, Work Study Desk Attendant - Campus Recreation, Buies Creek, NC (October 2023-Present). Ensured students checked into the gym properly, checked equipment out to students, cleaned equipment, and signed students up for fitness classes. Messiah Lifeways Retirement Community, Dining Specialist, Mechanicsburg, PA (August 2020-Present). Responsible for working in various residential communities, including personal care, memory care, and skilled nursing. Prepared and served food to residents,

took meal orders, cleaned dishes, tables, and counters, and engaged with residents. Assisted in training new employees in working efficiently and effectively. Learned excellent team communication skills with my colleagues during fast-paced mealtimes. Worked in any position that was needed or under short notice.

### EXTRACURRICULAR ACTIVITIES

Campbell University Club Spikeball; Intramural Volleyball, Pickleball, Flag Football, Basketball, and Softball; Youth Counselor at Camp Nawakwa, Biglerville, PA.

## Aaron Spivey

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### EDUCATION

Campbell University, Master of Trust and Wealth Management prospect 4+1, B.B.A in Business Administration, minor in Financial Planning: Expected graduation date: May 2027. Current overall GPA: 4.0. Recipient of scholarships, including the Scott Ellis Transfer and campus housing scholarships. Central Piedmont Community College A.A. in Business Administration, Minor in Finance: Graduation date: August 2024. American College of Financial Services, Chartered Financial Consultant prospect, Expected Certification achievement date: April 2025.

### WORK EXPERIENCE

Publix, Produce Associate (January 2023- August 2024)  
Provided customers with premier service to assist them in locating store-related items and maintained the department to which I was assigned with meticulous detail according to company policy. Stocked inventory and

trained new associates to perform at a higher standard than the company's requirement. Lastly, I maintained close relationships with recurring customers to maintain company loyalty and to provide more value the company can offer. United States Navy, Auxiliary Machinist Mate, Submariner (2020-2022) I operated, tested, assembled, and maintained complex machinery for underwater aquatic movement and crew life support with a highly motivated team to ensure mission success and emergency preparation. I also underwent rigorous informational and practical training regarding firefighting, damage control, weapons, and deadly force to ensure crew safety, protect secret military assets, and acquire the submarine certification required to perform the tasks necessary. Panera Bread (2019-2020) I Operated the cash register and payment systems to receive cash, check, and credit card payments for services sold at the store. I also cleaned and maintained the stores appearance to provide quality customer service. Lastly, I created and served meals to customers using quality ingredients.

### EXTRACURRICULAR ACTIVITIES

I currently participate in astronomy, investing, public affairs, and Future Business Leaders of America activities at Campbell University.

## Wade Sullivan

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### EDUCATION

Campbell University, Master of Business Administration Student, B.B.A in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2026; Dean's List, GPA: 3.152. Scott-Ellis Scholarship, Administrative on Campus Housing Scholarship, Prillaman, Gregory Lee Trust Bus Scholarship, Stephenson, Grace White & Gilbert Thomas Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certificate, Truist Emerging Leaders Certification.

### WORK EXPERIENCE

RBC Wealth Management, Financial Solutions Intern, Raleigh NC, (June 2024 – Present). Assisted two Financial Advisors with daily tasks such as filing reports for client meetings, reviewing client wealth plans, and overseeing retirement accounts and trusts. Entrusted with developing a marketing drip campaign for acquiring new

clients. Presented to the marketing team for feedback and approval. Became familiar with wealth planning technology tools such as RBC Wealth Plan. Observed client meetings and interactions. Organized annual client event. Walnut Creek Country Club, Turf Management Assistant, Walnut Creek NC, (May 2022 – August 2022), (May 2023 – August 2023), (May 2024 – June 2024). 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.

### EXTRACURRICULAR ACTIVITIES

Member of Club Baseball, Intramural Sports, Proficient in Microsoft Office, Campbell Social Events

## Abigail Tuyo

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### EDUCATION

Campbell University, BBA Trust and Wealth Management, Minor in Financial Planning, expected date of graduation: May 2026; GPA: 3.818, Scott Ellis Merit Scholarship- Junior, Administrative On Campus Housing Scholarship, Bank of America School of Business Trust Scholarship, Athletic Book Scholarship, Women's Volleyball Scholarship.

### WORK EXPERIENCE

Campbell University Student-Athlete (July 2022-Present). Student-athlete duties include time management for studies, long endurance practices, lifting, and treatment scheduling. Multi- Family nanny (May 2024-August 2024). Nannying for multiple families included managing six different children's personalities and individual wants. Provided transportation and food for each of the three families, as well as administering creative activities for entertainment. Jason Farmer Livestock Personal Assistant

(March 2022-May 2022). Assistant services included sorting and reconciling financial statements for company gas and credit cards, payroll sheets for employees, reconciling each of the four business accounts on QuickBooks software, learning how to manage multiple different companies along with their books, and sorting paperwork for each employee. Freedom Nutrition Nutritionist Assistant (February 2022-March 2022). Gained knowledge in customer service, money management, and payroll for a small business, as well as the importance of compliance with health and safety codes.

### EXTRACURRICULAR ACTIVITIES

NCAA Division 1 Women's Volleyball, Proficient in Microsoft Excel, PowerPoint, Word, Google Docs, and QuickBooks; Hobbies include: coaching young girls volleyball lessons, traveling to new places with family, and spending time with my dogs.

## Savannah Tyndall

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### EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 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 and Truist Emerging Leaders Certificate.

### WORK EXPERIENCE

Fiduciary, Investments, and Planning intern for Truist Bank (May 2024 – August 2024). Prepared estate analysis' for client meetings. Comprised an excel sheet to condense approximately 100 clients' Will file information. Entrusted with client interaction. Community Assistant for Campbell University Residence Life and Housing (August 2023 – May 2024). 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.

## Elijah Walsh

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### EDUCATION

Campbell University B.B.A in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation May 2026, GPA 3.0. Mens Basketball T&F Scholarship, Mens Basketball Housing Scholarship, Athletic Book Scholarship, Athletic Insurance Coverage; Full Tuition Athletic Scholarship.

### WORK EXPERIENCE

Coach at Campbell Basketball Summer Camps (Summer 2022, 2023, 2024) Coaching and instructing male youth athletes through Campbell University youth basketball summer camp. Instructed fundamentals of the sport and created basketball programming to include drills and assessment to enhance players current skill sets and development.

### EXTRACURRICULAR ACTIVITIES

Athletics: Campbell University Men's Basketball, Division I Program (Coastal Athletic Association Conference,) Student Athlete Advisory Committee (SAAC) working with the Diversity Equity and Inclusion section, Selected for Great Britain U20 National Basketball Team. Community Engagement: SAAC events (Community Service/Athletic Volunteer,) Buies Creek Elementary School.

## Claire Witt

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### EDUCATION

Campbell University Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2027; GPA: 3.810. Dean's List. CAA Commissioner's High Honors Academic Honor Roll. Scott Ellis Merit Scholarship, James A. Campbell Scholarship, Mae Murry G. Bruton UG Business Endowment, Truist Business Scholars Program, Davis Family Foundation Scholarship, Women's Lacrosse T&F Scholarship, Women's Lacrosse Meal Scholarship, Administrative on Campus Housing Scholarship.

### WORK EXPERIENCE

Beast Elite Youth Lacrosse Coach and Assistant Recruiting Director (2023-Current,) Coaching and instructing lacrosse to female youth athletes. Assistant recruiting director to include program development for students interested in collegiate lacrosse. North Paulding

Youth Lacrosse Coach (2021-2023,) Volunteer lacrosse coach for local community, instructed fundamentals of the sport and created lacrosse programming to include drills and assessments to enhance players current skill sets. Atlanta Youth Lacrosse Referee, Certified USA Lacrosse Youth Referee. Private Lacrosse Instructor developed players individually and assessed growth and development of youth players of various ages. Nanny and Babysitter (2020-Current). Responsible for household tasks and organization, and creative engagement/management with children of various ages.

### EXTRACURRICULAR ACTIVITIES

Athletics: Campbell University Women's Lacrosse, Division I Program (Coastal Athletic Association Conference) Student-Athletic Advisory Committee (SAAC,) USA Lacrosse High School All American, Lundy Fetterman School of Business: Truist Business Scholar, Community Engagement: SAAC Events (Community Service/Athletic Volunteer,) Buies Creek Elementary School Volunteering, Pleasant Union Christian Church, Giving Day (Top number of donors received for Campbell University in Fall of 2023)

## Paul Wright

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### EDUCATION

Campbell University, B.B.A in Trust and Wealth Management, Minor in Financial Planning: expected date of graduation May 2026; Overall GPA: 3.097 Scott-Ellis Merit Scholarship, Myrick, Doris P & Ray L business Scholarship, Phi Delta Theta First Generation Student Scholarship.

### WORK EXPERIENCE

Double LL Tack & Feed Warehouse Supervisor (November 2020-Present) As Warehouse Supervisor, I am responsible for managing feed rotation to ensure optimal quality and overseeing comprehensive logistics operations, including distribution, inventory management, and inspections within the warehouse. I also facilitate work conferences and train new staff members to ensure that all warehouse associates perform their duties with effectiveness. McDonald's crew trainer (May 2020-November 2020), I trained new crew members on

operational procedures and best practices for efficiently and safely completing customer orders. Additionally, I maintained food quality standards and ensured the kitchens overall cleanliness. Stanly Funeral Home (June 2018-July 2019) I supported families by managing relationships and providing emotional assistance and support during grief-stricken times. Additionally, I prepared gravesites to ensure they were clean and presentable for families and assisted with the setup and takedown of funeral equipment.

### EXTRACURRICULAR ACTIVITIES

Vice President of the Phi Delta Theta Fraternity North Carolina Zeta Chapter. Brotherhood Chairman and Fundraiser Chairman of Phi Delta Theta Fraternity North Carolina Zeta Chapter. CAB engagement Member and Planning Coordinator.