



CAMPBELL
UNIVERSITY

Lundy-Fetterman
School of Business

Trust & Wealth Management

2024– 2025

**Permanent Hire
Placement Bulletin**

Candidate List

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

Nick Aderholt

Christian Hunter

Micheal Anderson

Nicholas Jernigan

Jonathan Askew

Eric Klosterman

Ben Beaman

Keagan Leonard

Micheal Bowles

Carter Lewis

Warren Brown

Evan Lewis

Britton Burley

Peter Lieffrig

Eleanor Creed

Garnet Manley

Isaiah Espinoza

Tyra Parker

Jason Estrada

Jackson Shaw

Reagan Gee

Grant Solomon

Megan Harwood

Jared Williamson

Nick Aderholt



EDUCATION

Campbell University, B.B.A in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2025. Administrative on Campus Housing Scholarship, Campbell Need-Based Scholarship, Faison, James L Memorial Scholarship, Federated Investors Incorporated Trust Scholarship, Jenkins, Sue Weddle & B W Memorial Scholarship, Sauls, Dr Ernest P. Business Scholarship, Scott-Ellis Scholarship. Certifications Acquired: Brian Hamilton Foundation's Stater U Certificate, Microsoft PowerPoint Certificate, Microsoft Word Certificate.

WORK EXPERIENCE

Wells Fargo Trust Intern Analyst (June 2024-August 2024). Conducted over 90 annual account reviews for Trust and agency accounts, gaining expertise in analyzing governing and tax documents. Identified and categorized open items into low, medium, and high-risk categories, effectively communicating findings to Trust Officers and Risk Management. Assisted with authenticated client interactions and the processing of discretionary distribution requests. Completed Trust Synopsis forms, providing essential summaries and insights for account management. Contributed to audit mitigation efforts by remediating Know Your Client (KYC) information, completing and imaging FITSA tax forms, and finalizing new account checklists. Spangler Restoration Water Technician and Carpentry (May 2022-September 2023). Assisted with water mitigation, biohazard restoration, mold restoration, fire restoration, and residential/multi-family repairs. Worked in partners with coworkers to help mitigate homes that have dealt with disasters by demoing affected drywall, baseboards, flooring, and subflooring. Following the mitigation process I would set up equipment depending on the scope of work. Additionally, I worked as a carpenter and assisted in painting, hanging drywall, installing fixtures, replacing duct lines, and plumbing. Jersey Mikes employee (March 2021-August 2021). Created and served a variety of sandwiches while utilizing strong customer service skills. Assisted with prepping food, stocking inventory, making sandwiches, and ringing customers up. Attained managerial skills by implementing new customer service strategies and implementing team meetings for feedback purposes. Offensive Lineman Fundamental Football Coach (September 2020- May 2021). Single-handedly marketed to youth athletes around the greater Charlotte area. Responsible for organizing practice times with parents and participants, setting up drills, critiquing participant's performances, and mentoring participants. WCAA Flag football coach and referee (June 2020-August 2020). Assisted as a head coach, would substitute players during the game, create unique and effective plays, critique performances, talk to parents, and motivate participants to continue their football careers. Additionally, assisted as a referee where I was responsible for calling penalties, keeping score, and recognizing first downs. Inzios Pizza Napoletana Dishwasher (May 2020-December 2020). Assisted in washing and drying dishes as well as prepping

ingredients. Student Athlete Weddington High School (June 2018-June 2021). Assisted as a varsity starting full-back and offensive lineman throughout my three years. Attained and enforced team-building skills, motivating teammates, goal goal-creating. Furthermore, helped assist with a (15-1) record and a state championship in 2018 and a (16-0) record in 2019 leading to back-to-back state championship titles.

EXTRACURRICULAR ACTIVITIES

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

Micheal Anderson



EDUCATION

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

WORK EXPERIENCE

BNY Wealth Global Family Office, Pittsburgh, PA, Intern, June 2024-August 2024. Gained a holistic understanding of services available to family offices by networking with associates in custody and asset servicing, private banking, investment management, and fiduciary. Processed capital call transactions, updated asset pricing, performed tax lot adjustments, filtered and sorted group inboxes, and performed other ad-hoc tasks

as needed by relationship managers. Baker Tilly, Remote, Seasonal Tax Expert, December 2023-April 2024. Provided guidance and support for DIY Individual federal and state income tax return preparation. Prepared individual and small business tax returns for customers through video-enabled software and chat. Provided individualized troubleshooting, tax advice, and preparation assistance by utilizing defined practices, procedures, and company policies. Analyzed and researched a variety of tax matters to determine an appropriate course of action for customers. H&R Block, Seasonal Senior Tax Specialist, Holly Springs, NC, October 2022-April 2023. Conducted tax interviews and communicated with clients face-to-face and through virtual tools such as video, phone, chat, and email. Inspired clients to make confident, informed decisions about their finances through completion of individual tax returns. Collaborated with teammates when faced with unfamiliar situations. Planned tax strategies to provide the biggest refund or minimize tax liability for current and future years. UPS, Package Delivery Driver, Raleigh, NC, June 2019-June 2022. Safely operated delivery vehicles up to 24'. Organized and delivered packages weighing up to 150 pounds to residential, commercial, and industrial customers, making up to 400 delivery and pickup stops per day. UPS, Preloader & Sorter, Raleigh, NC, October 2018-June 2019 & June 2022- January 2024. Sorted up to 1200 packages per hour according to Zip Code. Organized and loaded up to 450 packages into each of 3 assigned delivery trucks for final mile delivery. Secret Shopper, Everywhere, 2019-Present. Analyze various aspects such as customer service, cleanliness, functionality, and accuracy of claims for a wide range of businesses including food and beverage, retail, and other service companies. Document findings through surveys and short reports.

EXTRACURRICULAR ACTIVITIES

Member of Campbell University Trust Fellows, IRS Volunteer Income Tax Assistance tax preparer.

Johnathan Askew



EDUCATION

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

WORK EXPERIENCE

Cumberland Trust Company summer intern (2024-2024). Trust analysis, audit preparation and compliance, special asset work (real estate), assisting executors of estates and trustees of trusts. Caldwell Trust Company, Trust summer intern (2023-2023). Assisted in client acquisition, estate closing, portfolio management and investment, and acquiring appraisers and real estate agents Grad Assistant for Campbell Student Union. (2023-Current) preparation and room set up and tear down for most Campbell related events held in the union. The Marq at Southlake, Lifeguard (2018-2020), Whistle Britches Restaurant, Server (2021-2021)

EXTRACURRICULAR ACTIVITIES

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

Ben Beaman



EDUCATION

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

WORK EXPERIENCE

Marketing Intern and Environmental Technician at Highlands Environmental Solutions, Inc. (April 2022 - Present). Established and currently managing the creation and posting of social media posts on the company LinkedIn page. Created and posted bi-weekly blog posts on various environmental topics for the company blog. Aided in various project administration work for several different billable projects. Corporate Intern at First Citizens Bank (May 2024 – August 2024). Worked within the Wealth Planning department and shadowed several different Wealth Planners. Assessed and integrated the strengths of Wealth Planning handouts from the bank's recent acquisition Silicon Valley Bank into First Citizens handouts. Sat in many client meetings and gained a deeper understanding of the uniqueness and complexity with each client's needs and the importance of a deep and broad understanding of various financial tools to approximately respond to these needs. Corporate Intern at First Citizens Bank (May 2023 – August 2023). Collaborated with the Institutional Trust, Trust Special and Technical Services, and Trust Operations departments. Gained skills and experience with various fintech software including: CapitalBase, OnBase, TrustDesk, and Envestnet. Conferred with and learned from well over 35+ First Citizens Registered Representatives and Associates regarding trusts, investment strategy and many other financial topics. Food Server at the Garden State Grill (March 2022 – December 2022). Developed extensive soft skills through communication and interactions with customers and coworkers. Expanded on my ability of managing stress while working in a high-pressure environment. Campbell University Fitness Ambassador (September 2021 - October 2021) and Supervisor (October 2021 - April 2022). Accomplished various department tasks and objectives through supervising staff and ensuring the safety of gym attendees. Developed leadership skills while acting in a supervisory role. Marketing Intern at Raymond Engineering (April 2020 - August 2021). Developed teamwork skills through working with many members of senior management directly on projects. Spent 250+ hours working with projects and carrying out administrative tasks through popular customer relationship management software Salesforce. Worked on and gained experience with Request for Proposal and Request for Qualification prospects and documents.

Micheal Bowles



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management; Expected date of graduation December 2024; GPA: 3.157, Scott-Ellis Merit Scholarship, 2023 CAA Student- Athlete Honor Roll, 2021-2022 Big South Student Athlete Honor Roll

WORK EXPERIENCE

Campbell University Student Athlete (August 2020-Present). I've played football at Campbell University for the past 4 years as a longsnapper. Intern Analyst at Wells Fargo (June 2024 - August 2024). I worked within the trust and wealth management department at Wells Fargo in Minneapolis, Minnesota. I primarily worked with the Great Lakes and Metro teams. I learned how to dissect and comprehend trust documents, close small accounts, use the trust software (SEI), complete AAR's, and other day to day Trust Officer duties. Intern at Bowles Construction (December 2020- August 2023). I worked

for Bowles Construction while I was home from school in Augusta Georgia. I did a variety of different jobs such as a carpenter's helper, day laborer, learned how to write estimates, and learned how to handle payroll. Groundskeeper at Augusta National (Masters tournament 2018, 2019). I worked on the course during the tournament on the litter control team. My job was to friendly interact with the patrons while changing out trash bags near and on tee boxes.

EXTRACURRICULAR ACTIVITIES

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

Warren Brown



EDUCATION

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

WORK EXPERIENCE

Work Experience: Wells Fargo, Philanthropic Services, Summer Intern, Winston Salem, North Carolina: June 2023- August 2023; completed administrative account reviews for the months of June, July, August, and September; keyed in TMM overdrafts with; participated in calls/meetings with the Grants/Scholarships team; updated progress reports and grant applications with the Grants/Scholarships team; learned to use SEI, Trust Gateway, Trust ImageView, and Filenet; Arden Trust Company-Intern (June 2024-August 2024); completed account reviews; completed Anti Money Laundering forms (AMLs); attended TAC, Special Asset, and Trust New Business committee meetings; presented a discretionary distribution request for the TAC committee; completed over 20 synoptic reports; helped trust officers clear action items/

EXTRACURRICULAR ACTIVITIES

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

Britton Burley



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning, Expected date of graduation: May 2025; GPA: 3.969. Scott Ellis Merit Scholarship, Administrative on Campus Housing Scholarship, The T. Harry Gatton Trust Scholarship, The Jack Corbett and Annie Adams Surles School of Business Endowed Scholarship, The Dr. Ernest Paskel Sauls Business Scholarship, The Willis and Marguerite Guppton Scholarship, The Smith Scholarship, The Buie Scholarship

WORK EXPERIENCE

Wells Fargo, Wealth and Investment Management Intern Analyst in Philanthropic Trust, Winston Salem, NC, June 2024 – August 2024. Completed a project that involved analyzing over 500 trust documents for restrictive language. Completed Administrative Account Reviews on agency trusts. Assisted with numerous tasks that included finding the correct statements to send out to beneficiaries and ensuring that the proper beneficiaries were set up correctly in accounts. Gained knowledge on scholarship and grant distributions by sitting in on multiple meetings. Wells Fargo, Wealth and Investment Management Intern Analyst in Personal Trust, Winston Salem, NC, June 2023 – August 2023. Completed Administrative Account Reviews, in order to ensure that accounts were up to date and in compliance. Worked to resolve open items that arose from the Administrative Account Reviews. Completed two different investment projects, which involved checking accounts for changes in circumstances. Completed a fees project that involved collecting information on fees for different accounts. Reviewed numerous boxes of files to ensure important documents were in the correct place. Completed five synoptic records, which involved gathering important data for the tax team. Gained knowledge about the field, through training from the permanent hires. Harrells Volunteer Fire Department, Volunteer Firefighter, Harrells, NC. March 2020 – Present. Responded to a wide variety of calls, and assisted people who were in need. Trained for many hours in order to better serve my community. Collaborated with other volunteers to ensure that the job got done in a safe and timely manner. Volunteer Income Tax Assistance, Volunteer Tax Preparer, Buies Creek, NC, (January 2023 – April 2023). Completed accurate tax returns for individual who needed assistance. Communicated with taxpayers, to ensure that they understood their tax situation. Burley Boy's Lawn Service, Lawn Care Specialist, Harrells, NC (Seasonal Employee) June 2017 – August 2022. Provided care to multiple lawns in my neighborhood and ensured that customers were satisfied.

EXTRACURRICULAR ACTIVITIES

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

Eleanor Creed



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2025; Undergraduate GPA: 3.504, Graduate GPA: 3.308. Southeastern Trust School Trust Management Scholarship, Emily Bratton MBA Endowment Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certificate; Trust Emerging Leaders Certification.

WORK EXPERIENCE

Blue Trust Philanthropic Trust Administrative Assistant (August 2024- Present) Aid the Philanthropic Trust team with administrative duties. Blue Trust Philanthropic Trust Intern (June- July 2024) Worked primarily with the Philanthropic Trust team, as well as with the Personal Trust and DEPP (Division of Estate & Philanthropic Planning) teams. Completed a variety of projects,

including: facilitating an internal video project to give a deeper company-wide understanding of Fiduciary Services function within Blue Trust, found and updated cost basis for 48 newly transferred accounts, edited letters for the DEPP team to use for notice to creditors, employer notice, bank search, and life search; did pre-acceptance document reviews for wills, CRTs, Grantor trusts, and NIMCRUTs; transferred 21 accounts to new teams, prepared 52 welcome and transition letters to send with annual reports, enrolled 54 clients in electronic delivery, created ticklers for note payments, prepared 30 client agreements, and more. Attended meetings with the Executive Leadership Team, a NIMCRUT roundtable discussion, small-group meetings with leadership members and fellow interns, and enjoyed gaining lots of practical, applicable knowledge during my time here. Advocacy Trust Trust Intern (May- August 2023). Assisted in the administration of trust accounts by sending distributions, completing administrative reviews, ratification requests, cash flow analysis preparation forms, unique asset reviews, welcome kits, market value updates for trust-owned assets, setting up remittance blocks, and more. Completed a variety of projects dealing with data compilation and trust-owned real estate. Listened in on client and vendor calls, attended meetings, and learned from employees across The Forge Companies.

EXTRACURRICULAR ACTIVITIES

Alpha Delta Pi Sorority Iota Beta Chapter: Vice President of Event Management December 2023-Present, Director of Philanthropy December 2022-December 2023, Leadership Engagement Specialist December 2022-December 2023; Phi Eta Sigma National Honor Society; Member

Isaiah Espinoza



EDUCATION

Campbell University, B. B. A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2025. Scott–Ellis Merit Scholarship, Administrative on Campus Housing Scholarship

WORK EXPERIENCE

Campbell University, Campus Recreation, Lillington, NC. (August 2022-December 2023) As a sports official for intramural sports, I ensured the maintenance of fair play, player safety, and game flow. Practiced swift, accurate, and time-sensitive decisions, safeguarded the integrity of all sports by enforcing rules and regulations, mediating disputes, and facilitated a level playing field all while creating an enjoyable experience for campus peers. Property Flipping. (June 2020- Present) Demonstrated expertise in market analysis, value optimization, and strategic renovation. Proven ability to maximize ROI while adhering to specific budgets and timelines. Proven ability

to manage and grow investments while maintaining professional and legal standards.

EXTRACURRICULAR ACTIVITIES

China Internship/Study Abroad. Assistant Elementary Teacher. Mens Club Soccer. Intramural Sports. Spanish Fluency.

Jason Estrada



EDUCATION

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

WORK EXPERIENCE

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

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

EXTRACURRICULAR ACTIVITIES

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

Jacob Creswell



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management. Expected date of graduation: December 2024; GPA: 3.822. President's List, Dean's List, Scott-Ellis Scholarship, Truist Business Scholars Program, Stephenson, Grace White and Gilbert Thomas Scholarship, Hale, G Fred Memorial Business Scholarship, Kess, Sidney Scholarship, Sauls, Dr. Ernest P. Business Scholarship, Administrative on Campus Housing Scholarship, Paschal Mary Scholarship, Barber, Joseph W & Dorothy Hicks Business Scholarship. Certifications Acquired: Truist Emerging Leaders Certification, Brian Hamilton Foundation's Starter U Certificate..

WORK EXPERIENCE

Trust Intern for First Covenant Trust and Advisors (June 2024-Present). Work with both business Development and Personal Trust coordinating the efficient and smooth transfer of future clients to trust administration through our future client pipeline. Complete task lists for discretionary distributions and client onboarding processes in Cheetah Software. Assist in the development and implementation of new future client program for company. Create estate plan review deliverables with Vanilla AI software. Review trust accounts annually to ensure accurate fee charges, adherence to trust document and engagement letters, and discretionary investment language. Trust Intern for Cumberland Trust Company (May 2023- August 2023). Assisted Trust Officers in many departments including the Personal Trust, Estates, Special Needs Trust, and Special Assets departments. Completed abstracts for new accounts. Helped organize the company vault. Called charities to gather W-9s for estate distributions. Prepared Excel sheets to help organize the evidence of insurance for real estate assets. Fixed interested party discrepancies in all personal trust accounts. Listened to client calls. Uploaded and organized documents for ninety-six special needs accounts on the Sales Force software. Attended weekly internal compliance committee calls. Poppyseed Market Waiter, Host, and Front Kitchen Staff (August 2020- August 2022). Provided efficient and dynamic organization of waiters and patrons. Resolved problems with discontented customers while maintaining a hospitable attitude. Ensured the daily safe wrapping and packaging of food for storage. Took inventory of foods. Assisted in the setup and breakdown of the restaurant including food, furniture, ovens, and more. Took takeout orders over the phone and ensured pickup orders were packaged and delivered correctly. Aided the Catering Manager with delivery of catering items to customers. Cleaned parts of the kitchen and the dining area. Aided the dishwashers with their duties.

EXTRACURRICULAR ACTIVITIES

2023 Templeton Business Ethics Competition; Runner up, Truist Business Scholars; Member, Grace Community Church; Member, Fellowship of Christian Athletes; President, Student Government Association; Representative, Club Baseball; Infielder.

Reagan Gee



EDUCATION

Campbell University, Master of Business Administration B.B.A in Trust and Wealth Management. Expected date of graduation: May 2025; cumulative GPA 3.651. Dean's List, Scott Ellis Transfer Scholarship, Administrative on Campus Housing Scholarship, Benjamin M. Hawkins Trust Scholarship.

WORK EXPERIENCE

Internship with Wells Fargo in Long Beach, CA (Summer of 2023 and 2024). Shadowed and learned the daily tasks of a Trust Officer. I currently work as a graduate assistant for Greek life and international students (2023-present). Helped provide administrative assistance to Trust Officers and worked on multiple projects alongside them. Chick-fil-A Front-of-house team member (2019- 2020) Provided exceptional customer service and answered questions while working on the register. I coordinated with my other team members by communicating and

helping them in order to improve efficiency. Additionally, I was in charge of the drive-thru, headset, handing the orders out of the window, and working the food line. I was a Door Dasher during the summers of 2021 and 2022, picking up orders for customers and providing excellent customer service for clients.

EXTRACURRICULAR ACTIVITIES

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

Megan Harwood



EDUCATION

Campbell University, Bachelor of Business Administration in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected date of graduation: May 2025; GPA: 3.678. Scott-Ellis Merit Scholarship, Tuton, Sue Worthington & Garland Wayne Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, Jessica N. White Endowed Scholarship, Sauls, Dr Ernest P. Business Scholarship.

WORK EXPERIENCE

Cumberland Trust and Investments Trust Administration Intern (May 2024- August 2024). Attended daily internal meetings. Prepared and organized over 5,000 accounts for audit. Young Men's Christian Association After School Site Coordinator (August 2022-Present). Planned daily schedule of events and activities. Managed and developed a staff of 4 members while providing coaching and mentorship, as well as conducting monthly performance evaluations. Worked with superiors to maintain a safe and inviting environment. Responsible for all children and staff as the first responder. First Presbyterian Church of Dunn Nursery Coordinator (August 2021-Present). Organized all aspects of the nursery for ease of accessibility. Worked closely with parents to understand their child's needs and concerns. Worked with parents to set clear expectations and plans. Gained strong expertise in client relations with frequent phone calls and in-person communication. YMCA Summer Camp Office Manager (June 2022-August 2023). Provided support to directors, organizing files and legal documents for 200 campers. Completing 4-5 disciplinary forms a day and handling all purchase receipts. Served as a resource for 30 staff members, by maintaining proper headcounts, and being approachable to answer any questions and give guidance. Was the main office receptionist, including answering 50+ phone calls a day, replying to general inquiries and greeting 200-300 parents and campers upon arrival and departure each day to ensure their needs were met. YMCA Summer Camp Counselor (June 2020-August 2021). Responsible for maintaining the safety and wellbeing of 12 campers through scheduled activities. Helping campers develop by encouraging the YMCA's 6 character traits; caring, respect, responsibility, honesty, faith in God, and spirit, with incentives throughout each day.

EXTRACURRICULAR ACTIVITIES

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

Christian Hunter



EDUCATION

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

WORK EXPERIENCE

The summer of 2024 I had a 10 week internship with Bank of America Private Bank in Atlanta, Ga. I had a concentration in Trust. During my time as an intern, I reviewed many accounts, participated in making discretionary request, handled administrative duties and learned the day to day of a complex trust office. I will be joining them full time June 2025 I hold a work study position at Campbell University. To go along with playing football, I currently hold a work-study position with the Strength and Conditioning program as well as the Equipment Staff. I upload data and various records into spreadsheets. I also help perform various tasks within both

programs, for example, assembling new workout equipment, sorting uniforms and gear, and recording the merchandise inventory. August 2022- Present I had a summer internship with the largest manufacturer of commercial trucks in North America. I assembled semi-trucks; I specialized in installing the brake system and hoses, producing at least 64 trucks a day. I trained new employees to assemble the braking systems. After being offered to come back for another summer I was tasked with assisting the HR department with finding solutions for the new hires that may be struggling. (May 2022 – August 2022, May 2023 – August 2023) I am a member (volunteer) of the production team for Tabernacle Baptist Church. I was in charge of lighting, I created programs for different scenes for live and recorded events held in our Worship Center. Being able to work in this area has allowed me to receive a few scholarships from the education dept at my church for college.

EXTRACURRICULAR ACTIVITIES

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

Nicholas Jernigan



EDUCATION

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

WORK EXPERIENCE

Campbell University Student Activities, Buies Creek, NC 2024-2025, As a Graduate Assistant for Student Activities, was tasked with helping set various events around campus, help with Campus Activities Board with print out, events, helping with finding replacement executive positions if needed, sit in on meetings, picking up international students from airport if the designated driver is unavailable. State Employees Credit Union Dunn Branch, Dunn, NC, 2023- 2024 As a peak time employee was tasked to help allocate members to the correct personal that will help them with their needs, answer the phone to make payments to transfer them to an office employee to help the member with their problem, review Loan Documents,

Account Service Forms, Death Documents, and Credit Reviews, balance loans at the end of each shift. Wells Fargo Philanthropic Trust Department, Winston-Salem, NC, 2024 As intern analysis with tasked with reviewing over 500 documents for restrictions or anything that would hinder Wells Fargo from paying out the income of a charitable trust to any beneficiary, completed Annual Account Reviews weekly, helped estimate the tax liability for some charitable trust, sat in on weekly meetings to determine distributions, helped complete numerous task for management to help with accounts Keith Hills, Lillington, NC, 2021-2023 As a Cart Boy/Proshop assistant, assisted keeping members satisfied, along with cleaning carts and putting them out for customers. Taking care of the golf carts and making notes of those that were damaged, tasked with making the schedule for employees, keeping up with their hours to make sure employees don't go over the limit, help organize the Proshop to look appealing to customers, provide great customer service while running the register checking people in for their tee time. State Employees Credit Union Trust Department, 2023 Raleigh NC, As an intern analysis for their planning team. Reviewed trust, wills, financial advisor planning sheets, scheduled meeting for members and attorneys, and weekly meetings with the vice president of the department, sat in on weekly meetings to determine distributions. Mac's General Merchandise, Benson, NC, 2018-2021 As a cashier/manager, was tasked with handling the money of the company, observing what items were selling out the most and the ones selling the least, used quick critical thinking to solve problems, exemplified excellent customer relations, and making sure it was a clean environment. Camp Dixie, Elizabethtown, NC, 2018-2022 As a Summer Camp Counselor/Lifeguard/Staff, given the responsibility of looking after children, excelled using great time management skills, putting forth effort to make customers want to come back the following year, always keep a high level of focus, became CPR and First Aid certified, maintained customers satisfied at all times.

EXTRACURRICULAR ACTIVITIES

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

Eric Klosterman



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected graduation date: December 2024; Major GPA: 3.9. Dean's List, Scott Ellis Transfer Scholarship, Lundy-Fetterman School of Business Faculty Endowed Scholarship, Gatton T. Harry Trust Scholarship.

WORK EXPERIENCE

Summer Intern, Wells Fargo (June 2024 - August 2024). Worked in the Philanthropic Department collaborating with other interns to read trust documents, find restrictive language, and correctly comment on and file the documents. Updated accounts on SEI (Trust 3000) and worked on closings. Summer Intern, RBC Trust Delaware (May 2023 - July 2023). Partnered with a Trust Administrative Officer to correspond with clients, accomplish daily tasks, and analyze client data and trust agreements. Provided input on discretionary disbursement

requests and successfully completed multiple projects throughout the summer. Server, The Chelsea Restaurant (May 2018 - December 2022) Worked as a dishwasher, busboy, cook, bar back, and server throughout my four and a half years at The Chelsea. Learned excellent communication skills and customer service in the high-stress, fast-paced environment of an upscale restaurant.

EXTRACURRICULAR ACTIVITIES

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

Keagan Leonard



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected date of graduation: May 2025; GPA 3.474. Scott-Ellis Scholarship. Certifications Acquired: Brian Hamilton Foundation's Start U Certificate, Real Estate Candidate.

WORK EXPERIENCE

Wait Staff/Front of House Manager/Line Cook of Abbey Road Tavern and Grill Fuquay (April 2018- Present). Associated with customer satisfaction, customer service, and the excellence of food quality and dining experience. Worked in unison with three or four other individuals to help a full restaurant of guests anywhere from 5-8 hours at a time. Focused on building positive relationships with customers, as well as with the restaurant to ensure long-lasting positive effects that will keep customers coming back. Associated with hours in the kitchen preparing and prepping food. Focused on following safety and health protocols as well as preparing food that would uphold the standards we had set. Working with 5-6 other cooks while creating meals that are enjoyable, don't violate customers' dietary restrictions, and exceed all of their expectations. Cary Auto Detailing (Entrepreneurship, June 2019-April 2020) Partnership associated with traveling around the triangle area washing cars. Offering upscale packages which focused on customer service as well as satisfaction to create repeat business and get a good first impression.

EXTRACURRICULAR ACTIVITIES

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

Carter Lewis



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Expected date of graduation: May 2025, GPA: 3.93, Wayne Community College, Associate in Arts, Phi Theta Kappa Honor Society, Campbell University President's List, Phi Kappa Phi Honor Society, Truist Business Scholar, Scott Ellis Merit Scholarship, First Citizens Bank Scholarship, Chick-Fil-A Remarkable Futures Scholarship, Wayne County Health Department Scholarship, Dr. Ernest P. Sauls Business Scholarship, Truist Business Scholars Scholarship, Betty & Alan Schilpp Scholarship, RA Housing Scholarship, Eastern North Carolina Firefighters' Association Scholarship

WORK EXPERIENCE

Bank of America Private Bank Trust Analyst, Wilmington, DE. (June 2024-August 2024) Worked alongside the U.S. Trust Company of Delaware team on Delaware directed, dynasty, and irrevocable trusts, with market values up to \$3 billion. Assisted senior trust officers through preparing resources, documentation, and summarizing complex trust relationships. Shadowed investment and relationship management teams in the Wilmington and Philadelphia offices. Completed an intern project focused on Delaware trustee capabilities. Campbell University, Community Manager, Lillington, NC. (August 2024-Present) Managed a team of nine Community Assistants across residence halls and Greek Life housing. Responsible for ensuring resident well-being, planning hall-wide and department-wide programs, working closely with Campbell University leadership, and responding to incidents on a duty rotation. Campbell University, Community Assistant, Lillington, NC. (August 2022-May 2024) Assisted students with facilities issues, lock-outs, and the safety and security of residence halls. Answered a duty phone to assist students. Created a sense of community in the residence halls through engaging events. Wells Fargo, Personal Trust Intern Analyst, Winston-Salem, NC. (June 2023-August 2023) Oversaw trust accounts (irrevocable, revocable, guardianship) and agency accounts with up to \$50 million market values alongside senior trust officers and risk management. Performed administrative account reviews, trust and agency closings, discretionary power exercises, beneficiary additions, and closed risk management open items. First Citizens BancShares Inc., Summer Float Sales and Service Representative, Greater Goldsboro, NC area. (May 2022-August 2022) Assisted clients with banking activities including deposits, withdrawals, check transactions, and foreign currency exchange up to \$10,000 with a high degree of knowledge and professionalism. Improved banking relationships and retention by promoting branch offers for credit cards, mortgages, loans, and specialized merchant services. Chick-Fil-A, Inc., Front-of-House Team Member, Goldsboro, NC. (January 2020-January 2022) Prepared guest orders and requests while exemplifying a "my pleasure" attitude.

EXTRACURRICULAR ACTIVITIES

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

Evan Lewis



EDUCATION

Campbell University, Master of Business Administration Candidate, Expected date of graduation: May 2025; GPA: 4.0. B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2025; GPA: 3.84. President's List, Dean's List, Scholar Athlete, Scott-Ellis Merit Scholarship, First Citizens Bank Scholarship, James A. Campbell Scholarship, Dr. Ernest Paskel Sauls Business Scholarship, Mary Paschal Trust Scholarship, Marvin Drake Johnson Trust Management Scholarship, Campbell University Cheer Scholarship, Administrative on Campus Housing Scholarship.

WORK EXPERIENCE

KPMG, High-Volume Trust Tax Intern, Tempe AZ (June 2024 – August 2024). Developed proficiency in OneSource as well as basic trust tax forms. Assisted tax associates with data projects and return preparation, while using AI with trust analysis. Wells Fargo, Personal Trust Intern Analyst, Winston-Salem NC (June 2023 – August 2023). Developed proficiency in SEI, Imageview, Filenet and TMT. Assisted trust officers with tasks related to accounts such as administrative account reviews, distribution requests, overdrafts and account closures. Trust Education Foundation Trust Advisor's Institute, Student Assistant, Buies Creek NC (Summer 2022). Assisted instructors in the execution and maintenance of the ATFA certification course, and attended all classes given by these instructors. Campbell University Student-Athlete (August 2022-Present). Merchants Distributors Inc. Warehouse selector, Hickory NC (May 2021- January 2023). Worked on a team in a production based job that required diligence and level-headedness in timed scenarios. Fairvalue Hometown Grocery Store, Customer Service Representative and Cashier, Granite Falls NC (September 2020-May 2021). Assisted with fulfilling customers' various requests, as well as handling transactions for the company.

EXTRACURRICULAR ACTIVITIES

President, Warden and Recruitment Chairman of the Executive Committee of the Phi Delta Theta Fraternity NC Zeta Chapter, Campbell University Cheerleading, Campbell University Wind Ensemble, Sound of the Sandhills Marching Band, Member of the Club Spikeball Team, Intramural Sports.

Peter Lieffrig



EDUCATION

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

WORK EXPERIENCE

Athletic Facility Supervisor, Holly Springs Parks and Recreation, Holly Springs, NC. (May 2018 – Present). As a Facility Supervisor I oversee our multi-purpose sports complexes and parks during rentals and athletic events. Primary tasks included assisting the renters with preparations for their field(s) with precision and expertise regarding their specific sport while providing exemplary customer service. Responded to injuries in a timely manner with certified First Aid and CPR experience. Secondary tasks included maintaining the facilities consisting of acquisition and disposal of waste and various seasonal maintenance including but not limited to power washing, rust prevention, turf repair and construction of new equipment. Game Day Site Coordinator, Wake Futbol Club, Holly Springs, NC. (September 2022 – Present) As a Game Day Site Coordinator I am expected to make sure everything runs smoothly and efficiently. Tasks include deploying videography equipment, setting up tents and benches for players, coaches and athletic trainers. Assess hydration needs and deploy coolers for teams and trainers accordingly. Fiduciary, Investments, Planning Intern, Truist, Atlanta, GA. (June 2024 – August 2024) Worked with SNT and Trust Only Teams. Helped complete account reviews. Updated information on client accounts. Helped close accounts and disburse funds to clients. Intern Analyst, Wells Fargo, Long Beach, CA. (June 2023 – August 2023) I assisted Trust Officers with annual account reviews. I accurately updated online databases with correct information and created documents to be sent out to clients regarding changes or alterations completed on their accounts. Athletic Aide, Holly Springs Parks and Recreation, Holly Springs, NC. (April 2017 - May 2018). As an Athletic Aide I assisted the Facility Supervisors at rentals with acquiring initial lineup cards, maintaining the correct information on the scoreboards, observed the games for injuries and recorded changes in data pertaining to specific sports.

EXTRACURRICULAR ACTIVITIES

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

Garnet Manley



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust and Wealth Management; Expected Graduation: May 2025; GPA: 3.99. President's List, Campbell University Presidential Scholarship, Men's Golf Scholarship, Administrative on Campus Housing Scholarship, Kenneth & Judie Satterfield Endowed Scholarship, Thomas & Judy Folwell Trust Management Scholarship. John Hill Trust and Wealth Management Scholarship

WORK EXPERIENCE

Campbell University Student-Athlete, Buies Creek, NC; 2020 – present. Truist, Trust Administration Intern, Atlanta, GA; June 2023 – August 2023. Reviewed trust documents for approval of discretionary funds. Created Monetary Discretionary Action forms and filed through the business software programs. Learned and developed hands-on experience in various sectors within the Trust department. Central Virginia Junior Golf Association, Tournament Administrator, Lynchburg, VA; May 2019 – August 2019. Operated junior golf tournaments. Managed the tour website and communicated with golf courses to set up events. Assisted junior golfers in abiding by the rules of tournament golf. Forest Youth Athletic Association, Youth Basketball Scorekeeper, Forest, VA; December 2017 – March 2018. Operated the game scoreboard and recorded the official game statistics. Communicated with players, coaches, and referees to ensure the games were played under the league rules.

EXTRACURRICULAR ACTIVITIES

Campbell University Division 1 Men's Golf Team, Volunteer Assistant Golf Coach for Jefferson Forest High School, Mentor for Junior Golfers. Student Athlete Advisory Committee for Campbell University.

Tyra Parker



EDUCATION

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

WORK EXPERIENCE

Intern Analyst, Wells Fargo, Austin, TX June 2024- August 2024. As an intern at Wells Fargo's Trust Department, my role involved conducting comprehensive annual account reviews and interpreting trust accounts, providing important experiences in the financial sector. I analyzed account statements, ensuring accuracy and compliance with both internal policies and regulatory standards. Each review

required a detailed understanding of trust provisions and beneficiary interests, which improved my analytical skills and expanded my knowledge of fiduciary responsibilities. While working closely with experienced professionals, I gained insights into the complexities of trust management and the strategic decisions that guide trust administration. Overall, my internship provided a solid foundation in trust services, preparing me for my future career in trust services. Hostess & Waitress, Big City Wings, Houston, TX May 2023 – Aug 2023. Utilized the Point Of Sale (POS) to process customer orders, complete payment transactions, and issue receipts. Provided customer service, including greeting guests in a friendly manner as they arrive, receiving orders, and accommodating the needs and requests of 100+ customers daily. Utilized in-depth knowledge of appropriate food handling techniques, such as proper soup temperatures and equipment cleaning procedures to ensure a sanitary work environment. Provided training to two newly hired waiters/waitresses to acquaint them with the restaurant's operational procedures, routines, policies, standards, and best practices. . Asst. Softball Coach, Blazed United, Houston, TX May 2023 – Aug 2021 Proficiently led practices and coached 12 player softball team of ages 13-14. Helped players to improve their batting, pitching and fielding skills. Created team strategies to raise the overall success rate of team resulting in two tournament wins out of five appearances within the season. Scheduled regular social activities with teams that enhanced cooperation between members and improving dynamic among teammates. Advised both players and parents on proper nutrition habits as well as tips for injury prevention; reducing number of injuries during games/practices

EXTRACURRICULAR ACTIVITIES

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

Jackson Shaw



EDUCATION

Campbell University, Master of Business Administration, B.B.A. In Trust and Wealth Management, Minor in Financial Planning; Expected date of Graduation: May 2025; GPA: 3.297. Deans list, Truist Business Scholar, Fiduciary Fund Investment Committee Founder, Scott Ellis Merit Scholarship, Administrative On Campus Housing Scholarship, Alumni Book scholarship, Lundy Fetter School of Business Fellows, and Newkirk Family Trust Management.

WORK EXPERIENCE

Campbell University Lundy-Fetterman School of Business, Graduate Assistant & Trust and Wealth Management Graduate Assistant; Buies Creek, North Carolina (August 2024- Present). Assist faculty and staff members with tasks relevant to the Lundy-Fetterman School of Business. Support the Director of Trust and Wealth Management with preparations for the Annual Trust Advisors Forum Caldwell Trust Company, Intern, Sarasota/ Venice, Florida. (June 2024-August 2024). I was able to assist in investment portfolio allocation, stock selection, Reg 9 reviews, and financial planning. I also had ample exposure to the estate process, client acquisitions, real estate, trust administration, internal committee meetings, and how a trust company operates. Keith Hills Golf Club, Part-Time Cart Staff, Buies Creek, North Carolina. (August 2023 – March 2024). This part-time position involved working indoors as a Pro Shop clerk and outdoors as part of the Golfcart Staff. My work in the Pro Shop included but was not limited to, accurate money handling and check-out duties involving the cash register, maintaining all retail areas, and demonstrating strong communication skills with the patrons to provide exceptional customer service. My duties as a member of Golfcart Staff were being responsible for maintaining consistently clean carts for customers. I was also managing the range, ensuring our golf ball dispensers on all ranges were full and practice facilities were well kept at closing. Campbell University, Student Worker-Graduate Assistant for Trust and Wealth Management, Buies Creek North Carolina. (August 2023- May 2024). Assist the Director of Campbell's Trust program in preparing and executing the Trust Advisors Forum. Handle a special project for the Director to recruit high school students into the Trust program. Aid the Business School's Director of Career Services and Professional Development with career-focused events. Perform other Business School duties as assigned. Wells Fargo, Personal trust Center Owned Team intern, Winston Salem, North Carolina. (June 2023- August 2023). I accomplished several months in advance of Administrative account reviews for team admins. I had the opportunity to effectively finalize investment projects for two different teams. I was tasked with completing a fee project where I had to gather and collect information on fees for accounts that were newly inherited. I concluded numerous opti code changes for open items for several different admins that were created from administrative account reviews. Reviewed the contents of thirty boxes of files and assessed

important documents that were to be kept in the vault. I also was tasked with other administrative duties like reviewing and creating synoptic reviews for accounts, sorting and reviewing correspondence, and providing scanned copies to out-of-office administrators or delivering them personally.

EXTRACURRICULAR ACTIVITIES

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

Grant Solomonick



EDUCATION

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

WORK EXPERIENCE

Summer of 2024: Wells Fargo – Trust Client Advisor Services, Intern Analyst – Personal Trust, Winston-Salem, NC. Executed numerous Irrevocable Trust Annual Account Reviews. Processed discretionary trust distributions. Participated in corporate risk meetings to resolve and close open item exposures. Summer of 2023: Wells Fargo - Trust Client Advisor Services, Intern

Analyst - IRA, Winston-Salem, NC. Created detailed trust summary documentation. Performed over 350 detailed Annual Account Reviews. Completed IRA account closing checklists. Executed Required Minimum Distributions as requested by clients. Summer of 2022: Global View Capital Advisors, Intern, Winston-Salem, NC. Assisted Branch Supervisor with financial planning duties. Engaged in both client financial planning meetings and corporate strategy sessions; initiated, prepared, and executed client workflows and checklists to ensure timely completion of client account tasks; organized, updated, and created Customer Relationship Management (CRM) datasets and reports. Utilized financial planning software tools including: the Global View Capital Advisors platform consisting of Investment, Retirement, Insurance, Education, Tax, and Estate modules; Wealthbox CRM tool for financial advisors.

EXTRACURRICULAR ACTIVITIES

Member of Phi Eta Sigma National Honor Society. Member of Phi Kappa Phi Honor Society. Campbell University Investment Fiduciary Fund team member. Designated by pastor to serve as Peace Haven Baptist Church Youth Group Leader. Competed on Campbell University Club and Intramural Basketball teams. NCAAU state basketball champion. Volunteered at ABC of North Carolina Child Development Center serving children with autism, Down syndrome, cerebral palsy, and behavioral issues by teaching them to read. Served as Miracle Hill in Motion supervisor for one of South Carolina's largest homeless shelter fundraisers. Possess basic comprehension of Spanish language. Interests include basketball, history, and international travel.

Jared Williamson



EDUCATION

Campbell University, 4+1 Master of Business Administration, Minor in Financial Planning: Expected Date of Graduation: May 2025; Undergrad GPA: 3.532, MBA GPA:4.0, Dean's List, Presidential Scholarship, Administrative On Campus Housing Scholarship, Dixie Youth Baseball Scholarship, D.P. and Helen Russ School of Business Scholarship, Betty and Alan Schilpp Scholarship, Janice Daniels and Clifford Russell Miller Scholarship

WORK EXPERIENCE

Southeastern Trust Company Trust Intern, Chattanooga, TN. (May-August 2024) Here I was tasked with document management, bill pay, and data analysis. Included were the opportunities to meet face to face with trust clients and see how communication between the administrator and client was supposed to be. Wells Fargo N.A. Wealth and Investment Management Analyst Intern, Winston Salem, NC

(June-August 2023) As an intern analyst I assisted with running administrative account reviews, sat in on various meetings with management and clients, while learning about the inner workings of a trust department at a worldwide bank. I became fluent in systems such as SEI Trust 3000, FileNet, SharePoint, and Trust Gateway. Campbell University Campus Recreation Intramural Supervisor. As an intramural supervisor I assist in organizing and running various intramural sports, while providing answers to players if asked. Lowes Fulfillment Associate. Organized and staged all customer orders while providing excellent customer service and critical thinking opportunities. Campbell University Campus Recreation Intramural Official. While being an intramural official I officiated various intramural games, keeping processes organized and clean. Automotive detailer. Developed and fulfilled requirements of a detailing business while assisting and marketing to customers.

EXTRACURRICULAR ACTIVITIES

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