

Fort Collins, CO | 970.222.2222 | finn.planner@email.com

FINN PLANNER

PERFORMANCE DRIVEN | ANALYTICAL | CUSTOMER SERVICE ORIENTED

Ambitious student poised for a career in the financial services industry as a personal financial planner

QUALIFICATIONS

- Passion for empowering individuals and families to achieve their financial goals by providing guidance on investments, insurance, taxes, retirement, and estate planning
- Ability to identify strengths and weaknesses of a financial situation to provide a framework for decision making from a cost-benefit perspective
- Strong analytically; enjoy the challenge of adapting approach to each client based on their unique financial situation; experience developed through financial planning internship
- Entrepreneurial-minded with the confidence and drive to build a book of business from the ground up

EDUCATION

COLORADO STATE UNIVERSITY | Fort Collins, CO May 20XX

Bachelor of Science in Business Administration

Financial Planning Concentration | Certificate in **Entrepreneurship**

Certified Financial Planner (CFP®) Eligible May 20XX

Relevant Coursework Completed:

Risk Management & Insurance ▪ Principles of Investments ▪ Estate Planning
Employee Benefits & Retirement Planning ▪ Financial Plan Development

FINANCIAL PLANNING EXPERIENCE

ILLUMINATION WEALTH MANAGEMENT | San Diego, CA May 20XX – Aug 20XX

Financial Planning Intern

- Managed 15 new client onboarding processes and maintained over 500 client data accounts in company CRM
- Analyzed and prepared financial plans utilizing MoneyGuide Pro, Advizr, and Riskalyze financial planning software; presented to senior leadership in monthly meetings
- Identified client cash flow issues, providing consultation and recommendations
- Applied investment principles for globally-diversified, index investment strategies

STUDENT INVOLVEMENT

COLORADO STATE UNIVERSITY | Fort Collins, CO

College of Business **Finance Club**, Member

Aug 20XX – Present

College of Business **Entrepreneurship Club**, Member

Jan 20XX – Present

Business Diversity and Leadership Alliance (BDLA), Member

Aug 20XX - Present