

# Blaine W. Homan

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**Permanent Address:**  
1305 Vanceright Cir.  
Winchester, VA 22601

## EDUCATION

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**Virginia Tech, Pamplin College of Business, Blacksburg, VA**

BS in Business: Finance - *Investment Management Track*

Overall GPA: 3.64/4.00

Dean's List Recipient

*Expected Graduation: May 2018*

**West Virginia University, College of Business and Economics, Morgantown, WV**

Major: Finance

Overall GPA: 3.90/4.00

President's and Dean's List Recipient

*Fall 2014 – Spring 2015*

## WORK EXPERIENCE

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**Kurtz, Connor, Browning & Phillips, LLC., Vienna, VA**

*Financial Advisor Assistant Summer Intern*

*May 2017 – August 2017*

- Performed annual client performance reports using *NetX360*, *Albridge Wealth Reporting*, and *MoneyGuidePro*
- Executed cost basis reporting following sales made in taxable accounts using *Albridge Wealth Reporting* and *Microsoft Excel*
- Presented advisors with research and analysis on stocks, mutual funds, and exchange-traded funds using *Morningstar Advisor Workstation* and *Microsoft Excel*
- Developed spreadsheets that assisted advisors with monthly required minimum distributions and client retirement scenarios
- Consolidated and uploaded client onboarding process information into *Redtail CRM*
- Attended appointments with advisors on annual client reviews and unit investment trusts

**Shenandoah Valley Golf Club, Front Royal, VA**

*Maintenance Crew*

*May 2015 – August 2015*

- Worked with a diverse team to uphold one of Virginia's top 10 public golf courses
- Established a pleasurable outing for members and patrons by preserving the 27-hole course
- Assisted with the training of new employees on equipment and machinery
- Handled day-to-day operations under the golf course superintendent

**Chick-Fil-A, Winchester, VA**

*Crew Member*

*August 2012 – August 2014*

- Assembled and prepared menu items while maintaining proper sanitation levels around prep areas
- Managed inventory control while upholding service levels in the dining room and support areas
- Interacted at point of sale with customers to ensure a pleasant experience for all patrons
- Delivered operational excellence and customer service through second mile service

## LEADERSHIP AND ACTIVITIES

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**Beta Theta Pi Fraternity, Alpha Phi Chapter**

*Alumni Relations Chair (Executive Board Member)*

*Fall 2016 – Present*

- Establish and create alumni events while maintaining a \$3,000 semester budget
- Compose semi-annual newsletter sent out to 739 alumni

*Standards Committee*

*Fall 2016*

- Promote brotherhood development and provide self-governance

**Young Americans for Freedom**

*Fundraising Chair (Executive Board Member)*

*Spring 2016 – Present*

- Create and maintain a community donor network
- Organize club percentage nights to benefit the chapter

**Financial Planning Association**

*Active Member, Virginia Tech Chapter*

*Fall 2015 – Spring 2016*

- Networked with local financial advisors at weekly meetings