

Jonathan (Jon) R. Ludwig

Current Address:
508 Center St., Apt. 14
Blacksburg, VA 24060

jon2@vt.edu
(703) 547-7427

Permanent Address:
42575 Unbridleds Song Pl
South Riding, VA 20152

Objective: To develop the necessary skills and experience in financial planning through a summer internship

EDUCATION

Virginia Tech **Blacksburg, VA**
B.S. Business Expected Graduation: May 2018
Major: Finance, CFP® Certification Education Track *and* Investment Management, CFA Track **GPA:** 3.54

EXPERIENCE

FJY Financial **Reston, VA**
Financial Planning Summer Associate Summer 2017
Northwestern Mutual **Tyson's Corner, VA**
Financial Planning Representative Summer 2016

- Operated and built own financial planning practice to help individuals plan for a comfortable retirement
- Gained experience planning for risk, investments, retirement, business continuation, college savings, and estate transfer using proprietary software and Redtail CRM
- Held over 15 client meetings per week and collected data to build and maintain a growing client base
- Implemented campaigns to help office raise over \$6,000 for Alex's Lemonade Stand

RE/Max Gateway **Chantilly, Virginia**
Finance and Marketing Intern for Kathy Worek Group Summer 2015

- Learned basic accounting skills by documenting expenses using Quickbooks Online
- Used Excel to make competitive market analysis to determine a property's selling value
- Utilized online marketing tools like: Buffini, Top Producer, and Mail Chimp to engage with clients

Lifetime Fitness **Ashburn, Virginia**
Summer Camp Counselor Summer 2013 & 2014

LEADERSHIP & ACTIVITIES

Pamplin Leadership Development Team – President Spring 2017 - Present

- Actively manage a team of passionate business students to organize an annual leadership conference to facilitate the development of over 100 top-tier students to become successful young professionals

Pamplin Leadership Development Team – Corporate Relations Committee Spring 2015 - 2017

- Serve as a student liaison between the Pamplin School of Business and various corporate entities

Pamplin: Dean's Student Advisory Council Spring 2017 - Present

- Selected by the Dean of Pamplin to represent Virginia Tech's Financial Planning Association to help improve and grow our business school by providing insight from a committed student's perspective

Financial Planning Association Fall 2016 - Present

Delta Sigma Phi Social Fraternity – Treasurer: Executive Board Fall 2016 - Present

- Plan and manage annual budget using Excel, prepare weekly financial reports, collect membership dues, and actively contribute leadership as a member of the executive board

Delta Sigma Phi Social Fraternity – Social Media & Brotherhood Chair Fall 2014 - 2016

COMMUNITY SERVICE

American Red Cross – Fraternity Philanthropy: Helped raise \$20,000+ and promote donations of 200+ pints of blood 2015 - Present

Greeks Giving Back – Annually promote and donate a day of labor to help local families 2014 - Present

CERTIFICATIONS

Producer – Life, Health, and Annuities License in VA, MD, DC, SC, NC LN: 991051 2016 - Present

National Retail Federation (NRF) Certification in Customer Service CN: JL100914201520 2014 - Present