

Victoria "Alexa" Cornett

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Current Address:

1626 Patrick Henry Drive
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Permanent Address:

1314 Oakwood Drive
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Objective

Seeking full time employment as an entry level financial planner to build upon my experience, and to make an impact in the financial planning profession.

Education

Virginia Polytechnic Institute and State University (Virginia Tech), Blacksburg VA GPA: 2.59
B.S. Applied Economic Management Expected Graduation: May 2018
Option: Financial Planning Minor: Business

Work Experience

Kurtz, Connor, Browning, and Phillips: Intern; Vienna, VA May 2017- August 2017

- Client relationship management: shadowed client meetings with advisors and prepared client facing material.
- Worked with advisors to finalize annual review reporting material for client engagements, client policy eliminations and other portfolio adjustments.
- Ran and quality checked 1000+ rows of data in excel in support of cost basis reporting for clients.
- Learned to work with Redtail, NetX360, Albridge, Smartworks, Docupace, and Voya for Professionals.

Wealthminder: Intern; McLean, VA July 2015-August 2015

- Conducted weekly briefings with advisors on active proposals and acted as point of contact for customer relationships and marketplace requests.
- Collaborated with team members to develop updated marketplace communication strategy; Developed documentation for standard operating procedures and best practices for marketplace management.
- Streamlined automated data collection through revision of marketplace interactions.

Wells Fargo Advisors: Intern; Richmond, VA June 2015-June 2015

- Gained hands-on knowledge about the US economy and capital markets and their impact on client portfolios; Learned basic financial planning profiling for clients.

Gerczak Insurance Agency: Assistant; Richmond, VA August 2013-August 2014

- Completed customer healthcare applications, researched adequate responses to client questions, and maintained customer relationships.
- Worked independently to maintain organization of filing cabinets of client folders, managed incoming office files and data on Excel spreadsheets.

Activities

Financial Planning Association (FPA), VT Student Chapter Fall 2016-Present

Kappa Kappa Gamma, Zeta Mu Chapter Spring 2015-Present

- Junior and Senior Representative for Academic Excellence. Spring 2017-Present
- The Big Event, Relay for Life, Greeks Giving Back, Reading is Fundamental, and The Kappa Kappa Gamma Foundation.