

Alishia A. DuBois

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OBJECTIVE

Seeking an entry level financial planning position where I can apply my strong work ethic and communication skills, advance my knowledge of financial planning, and work towards passing the CFP® exam.

EDUCATION

Virginia Polytechnic Institute and State University (Virginia Tech), Blacksburg, VA GPA: 3.02/4.00
B.S., Applied Economic Management Expected Graduation: December 2017
Option: Financial Planning Minors: Business, Leadership
Creating Sustainable Social Change: Lugano/Africa Study Abroad Program Fall Semester 2016

WORK EXPERIENCE

Summit Financial Planning, Intern; Richmond, VA May 2016 – Present

- Observed process of completing a financial plan through MoneyGuidePro
- Organized and set-up client meetings; updated client profiles in MoneyGuidePro and Redtail
- Investigated the potential implementation of a college planning service; created and presented a personalized action plan for the child of a client
- Researched 529 plans and developed a detailed, logistical proposal for a client's grandchildren
- Explored, created and implemented Workflows in Redtail
- Traded stock through TD Ameritrade with permission of client
- Planned and coordinated client appreciation events
- Working remotely with similar responsibilities, including working to implement a retainer model

Child Care, Nanny/Babysitter; Richmond, VA and Blacksburg, VA June 2011 – Present

- Supervise children (6 months – 13 years) for 10+ families, all of whom still request care as needed

AIS Network, Marketing and Communications Intern; Richmond, VA May 2015 – May 2016

- Conducted extensive market research, prospect list development, eGov product messaging, and targeted sales outreach; continued to work remotely with similar responsibilities
- Developed and executed strategies for AISN's industry trade shows and sponsorships
- Mastered the technical functionality of AISN's email marketing platform and led all aspects of targeted outreach, including email messaging, design and campaign execution
- Researched and developed website content (e.g., FERPA compliance and cloud computing security)

Other Employment

Sake House Restaurant, Waitress and Hostess; Blacksburg, VA November 2014 – May 2015

The Dominion Country Club, Wedding Planner's Assistant; Richmond, VA May – August 2014

The Dominion Country Club, Banquet Server; Richmond, VA May – August 2014

ACTIVITIES

Financial Planning Association (FPA), VT Student Chapter, Vice President Spring 2015 – Present

FPA-BE Boston 2015, Student Volunteer September 2015

The Body Project, Facilitator August 2015 – May 2017

Alpha Chi Omega Sorority, Philanthropy Event Planning Committee January 2014 – May 2017

Alpha Chi Omega Sorority, Alumnae Member May 2017 – Present

Best Buddies at VT September 2013 – Present

Community Service

- Relay for Life, The Big Event, Greeks Giving Back, Women's Resource Center of New River Valley, Alpha Chi Omega's Domestic Violence Education and Awareness Philanthropy Week

GALLUP® STRENGTHSFINDER®

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