

J. Cole DeLucas

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Permanent Address:

3441 Izaak Walton Drive
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EDUCATION

Virginia Polytechnic Institute and State University (Virginia Tech)

Expected Graduation: May 2018

B.S: Finance, CFP® Certification Education Track

Dean's List: Spring 2015, Spring 2016, Spring 2017

Overall GPA: 3.45/4.0 In-Major GPA: 3.53/4.0

WORK EXPERIENCE

Yeske Buie, Vienna, VA

Financial Planning Intern

May – August 2017

- Implemented the entire onboarding process for a GenYeBu (millennial) client
- Wrote an article published on firm's website as well as in the biweekly newsletter, which is shared with over 900 clients and allied professionals
- Built an allocation for two clients' 401(k)s to match Yeske Buie's Investment Philosophy
- Created numerous Client Financial Reports that summarized insurance coverage, beneficiary designations and estate documents for use in client meetings
- Assisted in uploading documentation to the online portal
- Supported two financial planners in 10 client meetings by documenting notes and entering them into Salesforce
- Assisted team members in different roles with various projects (Senior Financial Planner, Resident Financial Planner, Organizations and Methods Manager, Client Service Administrator)
- Collaborated with staff to complete several Incentive Compensation Plan Projects

Wells Fargo/Pamplin Finance Winter Semester (one-week externship), Charlotte, NC

January 2017

- Competitive selection from Pamplin College juniors and seniors; given exposure to: The Private Bank, Wells Fargo Securities, Wells Fargo Advisors, Abbot Downing

The Commonwealth Group Inc., Harrisonburg, VA

Registered Representative/Investment Advisor Representative Intern

May – August 2016

- Entered client data in the Cambridge Investment Research Inc., proprietary CLIC interactive system
- Used Morningstar to analyze client portfolios
- Entered all clients' information including disability insurance, health insurance, life insurance, long term care insurance, managed accounts and securities into RedTail
- Completed preparatory compliance for financial advisor prior to client meetings and reviews
- Executed time value of money analyses of portfolios for clients considering distributions or withdrawals

LEADERSHIP/ACTIVITIES

Virginia Tech Men's Club Golf Team, Member

September 2017 – Present

Financial Planning Association (FPA), VT Student Chapter, Member

September 2015 – Present

Delta Sigma Phi Fraternity, Alumni Relations/Fundraising Chair

December 2015 – Present

- Created and currently leading a fraternity fundraising campaign to raise \$90,000 to buy our chapter house
- Building better relationships with alumni while presenting the campaign to them and also managing a committee to help with several aspects of the campaign

Emerging Fraternal Leaders Program, Member

September – December 2015

Virginia Tech Relay for Life, Hospitality Committee Member

September 2015 – April 2016

SKILLS / SOFTWARE

- Morningstar, Adobe, Salesforce, Redtail
- Gallup® StrengthsFinder®: Harmony, Discipline, Positivity, Maximizer, Focus