

David P. Shaughnessy

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EDUCATION

Virginia Polytechnic Institute and State University (Virginia Tech)

Pamplin College of Business

Bachelor of Science – Finance, CFP® Certification Education Option, Expected May 2018

Dean's List: Fall 2014, Spring 2015, Fall 2015, Spring 2016, Fall 2016, Spring 2017

Cumulative GPA: 3.641

In-Major GPA: 3.763

EXPERIENCE

Centurion Wealth Management (McLean, VA)

May 2017 – August 2017

Financial Planning Intern

- Responsible for processing onboarding client documentation, such as: Account Opening Applications, Transfer of Assets, Standing Instructions, Investment Management Agreements, Fee Schedule Disclosures, etc.
- Assisted Advisors with mutual fund conversions, life insurance quoting (Crump), alternative investment implementation and meeting agenda/recommendation creation
- Working directly under 3 Advisors, participated in client meetings assisting with note taking, documentation and follow through of post meeting action items, and input/assignment of tasks into Redtail CRM
- Performed pre-meeting estate planning analysis to find potential shortfalls in the estate plan that should be addressed
- Participated in Investment Committee meetings reviewing proprietary models and rebalancing on a quarterly or as needed basis, researching funds and the current economic environment to ensure target model performance

U.S. Pavement Services, Inc. (Woburn, MA)

June 2015 – August 2015

National Project Manager

- Conducted 10 pre-construction meetings with client managers to ensure project plan was efficient and suited to their needs
 - Assisted pavement crews with supply chain management aspects of projects including: determining tonnage of pavement, type of heavy machinery needed, and amount of equipment required for project
 - Resolved budget disputes of over \$100,000 between pavement crews and U.S. Pavement Services, Inc. home office
 - Supervised pavement projects of various sizes to ensure construction plan was being followed safely and effectively
 - Performed post-construction meetings and walkthroughs with client managers to ensure the paving projects were completed to both the client's satisfaction and U.S. Pavement's quality control standards
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TECHNICAL & PERSONAL SKILLS

- Experienced in various financial planning programs including: Redtail CRM, Laserfiche, LaserApp Anywhere, Wealthscape (Fidelity), Streetscape (NFS), Envestnet, and eMoney
 - Microsoft Office, with advanced Microsoft Excel: Tables and Charts, Pivot Tables and Pivot Charts, Lookup Functions, Financial Functions, Data Analysis Tools and What-If Analysis
 - Gallup® StrengthsFinder®: Futuristic, Focus, Competition, Relator, Analytic
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LEADERSHIP/INVOLVEMENT

Delta Sigma Phi Fraternity

February 2015 – Present

President (November 2016 – November 2017)

- Serves as contact point between Virginia Tech's Interfraternity Council and Delta Sigma Phi's 105 active members

Sergeant at Arms (November 2015 – November 2016)

- Served as Risk Management liaison with both the Virginia Tech campus and Blacksburg police departments