

**COLLEGE ADDRESS:**  
428 Lee St  
Blacksburg, VA 24060

**HEATHER A. TWEEDLIE**  
heatht5@vt.edu  
(571) 216-9636

**PERMANENT ADDRESS:**  
741 N Ashton St  
Alexandria, VA 22312

## Objective

---

Seeking entry-level position to begin my career and work toward becoming a CFP® and senior advisor, with the long-term goals of firm partnership and pro bono work with people of different financial backgrounds.

## Education

---

Virginia Polytechnic Institute and State University, Blacksburg, VA

*Expected May 2018*

**Bachelor of Science** – Applied Economic Management

In-Major GPA 3.14/4.00

Option: Financial Planning

Minor: Business

## Professional Experience

---

**McLean Asset Management Corporation, McLean, Virginia** (May 2017 – Present, remotely) *Intern*

- Analyzed Form 1040 and associated Schedules A, B, C, D, and E for tax projection in CFS Tax Software.
- Developed and presented to advisor, tax loss harvesting and tax planning strategies for clients.
- Performed Social Security analysis for optimal Social Security benefit election strategies.
- Assisted lead advisors in client meetings with the preparation of updated contracts and paperwork, investment evaluation, realized gain/loss report, beneficiary report, estate planning report, and updated net worth statement.
- Established income distribution plans for new clients.
- Performed a personal benchmark analysis for existing clients, including analysis of income distribution plans and necessary changes to reach goals; portfolio accounts and allocation; income projections; and tax implications of planned changes.
- Performed high-level analysis of new client portfolio for asset allocation and portfolio comparison.
- Researched HSA providers (e.g., menu design/use, price, investment alternatives/performance, etc.), made a recommendation to management, and assisted with implementation of my recommended plan provider.
- Attended client meetings, recorded information in Salesforce and updated and maintained client folders.

**AARP, Washington D.C.** (June 2016 – January 2017, virtually during academic year) *Data & Research Analyst*

- Analyzed financial statements and final reports for private and public entities.
- Prepared briefings and other analyses for presentation to management officials and stakeholders.
- Data mined, conducted research and prepared deliverable for superiors and stakeholders.
- Assessed resources and time; coordinated scheduling across different areas, with a focus on efficiency.
- Assessed resources and coordinated the resource allocation/budget and the execution process.
- Assisted in the development and implementation of a three-month data project.
- Led the management of the data project and team through all phases.

## Collegiate Affiliations & Leadership

---

Sigma Kappa, member

January 2016 – Present

The Big Event, Logistics Committee

November 2016 – Present

Financial Planning Association, member

August 2016 – Present

AXA Advisors, LLC NEXT Step Externship, Falls Church, VA

February 2017 – March 2017

- Worked with team to apply critical thinking and financial planning knowledge to develop and present financial plans to help fictional clients achieve financial security. Learned basic sales skills.

## Skills

---

Proficient in: Microsoft Office (Word, Excel, PowerPoint, Access, Outlook); RStudio; ShareNet; Tableau; CFS Tax Software; InStream Solutions; Social Security Timing; Salesforce; Orion

StrengthsQuest™: Strategic, Analytical, Restorative, Achiever, Discipline