

Jacob (Jake) J. Clark

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5 Poindexter Court, Williamsburg, VA 23188

OBJECTIVE

Highly-motivated, responsible, and organized student seeking an opportunity to grow my experiences and knowledge in financial planning through a summer 2018 internship.

EDUCATION

Virginia Polytechnic Institute, Blacksburg, VA

B.S. Business, *Expected May 2020*

Major: Finance, Option: CFP® Certification Education

Relevant Courses: Business Analytics (Excel), Personal Financial Planning, Microeconomics

WORK EXPERIENCE

Internship with Compliance Department

September 2017-Present

Davenport and Company LLC, Roanoke, VA

- Assist the head of the Compliance Department with tracking advisors and stock trades they make
- Create spreadsheets to help the Compliance Department monitor advisors' trading practices
- Work with Thompson One to research stocks

Internship with Anderson Financial Advisory Group

May 2017-August 2017

Davenport & Company LLC, Williamsburg, VA

- Created an Excel investment model for the team
- Assisted an advisor with client prospecting by researching neighborhoods and sending letters
- Assisted with multiple 401(k) enrollment and education meetings
- Helped organize Salesforce accounts by tiering for prospecting and service calls
- Created Morningstar Allocation Reports for prospects and clients
- Supported the team to achieve their goals (e.g., administrative support, errands, etc.)
- Researched stocks and client accounts using Thompson One

Home Building Assistant

June 2013-May 2017

Jeffrey N. Clark Custom Builder, Williamsburg, VA

(Seasonal and Academic Breaks)

- Assisted in cleaning and maintenance of homes being built
- Completed minor construction tasks as assigned

COLLEGIATE ACTIVITIES

- Northstar Church, Children's Ministry Volunteer, Blacksburg, VA October 2017-Present
 - Assist with the Children's Ministry Department, ranging from kindergarten to fifth grade
 - Sing, dance, and interact with children and assist with teaching
- Financial Planning Association Student Chapter Fall 2016-Present
- Campus Crusaders Fall 2016-Present
- Intramural Volleyball Fall 2016

SKILLS

- Proficient in Microsoft Excel, PowerPoint and Word
- Adept at using social media to promote events and create group pages
- Excellent interpersonal communication skills
- Skilled at using Thompson One and Salesforce