

James N. Perriello

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Permanent Address:
5785 Ridge Road
Cazenovia, NY 13035

Current Address:
722 Golden Harvest Circle
Blacksburg, VA 24060

EDUCATION

Virginia Polytechnic Institute and State University (Virginia Tech)
Pamplin College of Business, B.S. in Business, Major: Finance, CFP® Option
Overall GPA: 3.51/4.00, Dean's List (3 of 4 Semesters)

Blacksburg, VA
Expected Graduation: May 2019

WORK EXPERIENCE

Rockbridge Investment Management

Summer Intern

Syracuse, NY

June 2017 – August 2017

- Analyzed the financial situation of prospective clients and utilized MoneyGuidePro to develop financial plans
- Sat in on and took notes during prospective client discovery meetings
- Used Vanguard portfolio analytics tools to compare and analyze characteristics of hypothetical portfolios
- Completed projects on market concepts and applications in a weekly investment class led by the CIO

James Tobey Landscaping

Landscaper and Gardener

Cazenovia, NY

May 2016 – August 2016

- Communicated with clients daily to ensure high satisfaction and plan next lawn and garden appointments
- Performed a variety of maintenance tasks on a regular basis for 15-20 customers per week

Cazenovia Area Volunteer Ambulance Corps (CAVAC)

Student Corps Chief of Operations

Cazenovia, NY

May 2014 – August 2015

Student Corps President

May 2013 – May 2014

- Managed, updated, and oversaw online scheduling system for 30 student corps volunteers
- Handled emergency calls, implemented CPR and first aid training on rig if needed, and assisted the paramedic

HONORS & SCHOLARSHIPS

- Selected to attend the 18th Annual Pamplin Student Leadership Conference *January 2017*
- Awarded the Virginia Tech Scholars Scholarship based on educational achievements *August 2015*
- Cazenovia Area Volunteer Ambulance Corps Student Corps Scholarship *June 2015*

ACTIVITIES

Financial Planning Association (FPA) – Virginia Tech Student Chapter

February 2017 – Present

Pamplin Leadership Development Team – Hospitality Committee

March 2017 – Present

- Help plan and manage the Annual Student Leadership Conference for 100 competitively selected students
- Manage a budget to fulfill the hospitality needs for the conference sponsored by six major companies

Finance Club at Virginia Tech

August 2016 – Present

Intramural Sports – Team Captain

September 2015 – Present

- Helped create intramural basketball, flag football, and softball teams that have remained intact

MENTORING & SERVICE

Pamplin Global Mentors – Mentor

April 2017 – Present

- Befriend three international students while they acclimate to the Pamplin College of Business

The Big Event at Virginia Tech – Student Volunteer

April 2016, 2017

OTHER INTERESTS

Personal ETF Portfolio Management

August 2017 – Present

Music School of CNY Guitar Ensemble – Classical Guitarist

May 2008 – Seasonal

- Founding member of classical guitar ensemble that continues to grow in quality and presence
- Perform with an eight person ensemble at venues such as universities, art galleries, and small concert halls