

College Address:
401 Progress Street
Blacksburg, VA 24060

Mark D. Colson
(540) 333-2890
markc5@vt.edu

Permanent Address:
132 White Ox Lane
Strasburg, VA 22657

Objective

To start my career in the financial planning profession that will help me grow in my knowledge and skills needed to be a successful advisor.

Education

Virginia Polytechnic Institute and State University (Virginia Tech) | Blacksburg, VA
B.S. Business
Major: Finance, CFP® Certification Education Track
GPA: 3.25

Expected: December 2017
Minor: History

Dean's List | Fall 2013, Spring 2015

Experience

Summer Associate

May 2017 – August 2017

Financial-360, LLC, Rockville, MD

- Prepared client meeting documents USING WHAT? and created the meeting agendas.
- Attended client meetings, took notes, and recorded meeting in Encounter CRM.
- Analyzed individual client accounts and recorded their compliance with DOL Fiduciary ruling.
- Created a presentation on financial planning for unmarried couples for the 2017 national FPA Conference.

Sales/Marketing Intern

May 2016 – August 2016

Around Campus Group, Chapel Hill, NC

- Developed relationships with business owners in Blacksburg, VA.
- Showed proposed marketing options to business owners.
- Facilitated the sale to local businesses of marketing options in the Virginia Tech campus planner.
- Worked with local business owners and company management to create ideal marketing logos.

Business Manager

May 2015 – August 2015

Theodore Roosevelt Council Boy Scouts of America, Massapequa, NY

- Monitored and maintained Onteroa Scout Reservation budget and funds of \$285,000.
- Handled all camp purchasing and payment of debts, and acted as liaison with outside vendors.
- Documented and oversaw distribution of staff payroll.
- Managed camp Trading Post and its three employees.
- Gained experience in interacting with customers and creating payment plans to cover camp costs.

Trading Post Manager

June 2014 – August 2014

Theodore Roosevelt Council Boy Scouts of America, Massapequa, NY

- Oversaw daily operations of Onteroa Scout Reservation Trading Post.
 - Coordinated and organized opening and closing of the Trading Post.
 - Counted and recorded daily revenue.
 - Trained and supervised staff of three in daily operations.
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Activities & Leadership

Financial Planning Association (FPA), Virginia Tech Student Chapter

Fall 2015 – Present

FPA BE Annual Conference, Student Volunteer, Baltimore, MD

September, 2016

Sigma Nu Fraternity, Brother

Fall 2013 – Present

- Chapter Lead Chairman, arrange and coordinate chapter educational seminars with professionals (Fall 2016 – Present).
- Event Planning Committee, plan and conduct fraternity recruitment and philanthropy events (Fall 2015 – Present).
- Chapter Treasurer, managed budgets and prepared chapter tax form 990-EZ (Fall 2015 – Fall 2016).
- Volunteer with Habit for Humanity and various campus philanthropy events.

Boy Scout of America

Spring 2005 – Present

- Eagle Scout | Attained: 2011
- Youth Leader, Adult Assistant Scoutmaster, Certified Merit Badge Counselor

StrengthsQuest™: Restorative, Developer, Context, Relator, Responsibility.