

**Current Address:**  
204 Forest Avenue  
Galax, VA 24333

# Katherine “Paige” Hanks

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**School Address:**  
301 Roanoke Street  
Blacksburg, VA 24061

## EDUCATION

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### **Virginia Polytechnic Institute and State University, Blacksburg, VA**

B.S. in Business *Expected Graduation: May 2018*

Major: Finance (CFP® Certification Education Track) *and* Business Leadership Minor

Cumulative GPA: 3.42/4.00

Dean’s List: all semesters

### **Study Abroad in Muenster, Germany “Doing Business in Europe”**

*June 2015*

## WORK EXPERIENCE

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### **Merrill Lynch**

*Summer 2017*

*Financial Advisor Summer Analyst-Charlotte, NC*

- Prepared client review reports and took notes for advisors during client meetings
- Used Salesforce to create action plans and organize the team’s upcoming and previous tasks
- Gained experience using Wealth Outlook to create financial plans

### **Wells Fargo**

*Winter 2017*

*Pamplin Winter Practicum-Charlotte, NC*

- Selected to participate in two-week program consisting of classroom study and a week visit to Wells Fargo headquarters
- Networked with professionals throughout the bank, learning about wealth management portfolio analysis and career paths

### **Vanguard**

*Fall 2016*

*Explore Day Program-Charlotte, NC*

- One-day event to learn about opportunities within Vanguard and network with employees

### **Ameriprise Financial**

*Summer 2016*

*Financial Planning Intern-Radford, VA*

- Prepared preliminary budget reviews for clients and used NaviPlan to develop financial plans
- Observed advisor client meetings to learn about client relationship management skills and client advice
- Used Quicken to track company’s expenses

*Office Assistant-Galax, VA*

*Summer 2015*

- Assisted the office manager with daily operations using Microsoft Office
- Special projects to improve branch efficiency; experience with Advisor Compass and Thomson One

### **Carter Bank and Trust**

*Summer 2016*

*Bank Teller-Blacksburg, VA*

- Handled, processed, and serviced clients’ transactions in a prompt, efficient, and accurate manner

## LEADERSHIP AND ACTIVITIES

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### **Kappa Delta Sorority**

*January 201-Present*

*Vice President of Finance*

*November 2015-2016*

- Monitored and managed chapter’s \$100,000 budget
- Billed chapter members using accounting system, Bill highway, and paid chapter bills

*Budget Committee*

*November 2015-2017*

- Prepared budget for upcoming fiscal year

### **Financial Planning Association**

*Spring 2016-Present*

### **Sigma Alpha Lambda (SAL) National Honor Society**

*Spring 2015-Present*

### **Virginia Tech Club Tennis Team**

*Fall 2015-Present*