



CAMPBELL
UNIVERSITY

Lundy-Fetterman
School of Business

Trust & Wealth Management

2025– 2026

**Permanent Hire
Placement Bulletin**

Candidate List

Below is an alphabetical listing of the talented students included within this bulletin. Please browse this document to learn more about each of them, including education, work experience, and involvement in extracurricular activities

Mark Allen

Charles Lewis

Ashlyn Baucom

Steven Mirabile

Brock Bidwell

Jeff Neff

Ethan Brooking

Grace Newby

MacKenzie Campbell

Matthew Pennington

Maddox Capps

Hayden Phatuross

Jessica Coutts

Zach Rine

Abigail Croom

Aaron Spivey

McKenna Duncan

Wade Sullivan

Jayden Giles

Abigail Tuyo

Christian Gilmore

Savannah Tyndall

Richard Hager

Claire Witt

Logan Ladue

Paul Wright

Bryson Lee

Mark Allen



EDUCATION

Campbell University, Master of Business Administration, and B. B. A. in Trust and Wealth Management and PreLaw; Expected Graduation: May 2026; GPA: 3.872 Honors include: J. A. Campbell Presidential Scholarship; Bradley and Kathy Creed Trust Endowment; Fred G. Hale Memorial Scholarship; Grubb Family Scholarship; Henry E. and Melba Hinson Williams Scholarship; Peggy Lawrence Scholarship; PEP Band Scholarship; Band Performance Scholarship; Truist Business Fellows Scholarship; Community Foundation of Western North Carolina's H. W. Clarke Scholarship; Dr. Ernest P. Sauls Business Scholarship; Harry John Guyler Business Scholarship; Southeastern Trust School Trust Management Scholarship; National Dixie Youth Baseball Scholarship; KM Elite Scholarship; Mickey A. Church Cleveland County Scholarship, Scott Ellis Merit Scholarship, and Housing Scholarship. President's List, and Dean's List every semester.

WORK EXPERIENCE

Brown Brothers Harriman, Trust Associate Intern (May 2025- August 2025). I supported the daily operations of the trust business by ensuring efficiency and accuracy across tasks. I analyzed and assisted with estate administration, irrevocable life insurance trusts (ILITs), investment restrictions, personal trusts, and community foundations. I collaborated closely with team members, clients, and banking professionals nationwide to facilitate effective communication and service delivery. In July 2025, I prepared and delivered a presentation to the Board of Trustees on Wall Street in New York City. This experience enhanced my technical knowledge of the trust industry, strengthened my professional communication skills, and broadened my overall perspective on estate and wealth management. *Wells Fargo*, Trust Client and Advisor Services, Intern Analyst (May 2024- August 2024). I acquired in-depth knowledge of the operations of the Personal Trust Department and cultivated strong professional relationships within the Wells Fargo Personal Trust team. I mastered the use of SEI, Trust Management Tool, and Image View, applying these platforms to support daily operations. I reviewed and analyzed trust documents, ensured accurate coding across essential software systems, and contributed to the department's overall efficiency and precision. *Cramer Mountain Country Club Restaurant* (May 2023- August 2023) I applied strong communication skills to efficiently direct club members to their assigned seating areas. Within two weeks of joining, I was promoted to the role of server, where I established positive relationships with both members and colleagues. In this capacity, I prioritized guest satisfaction by ensuring accurate and timely delivery of orders, consistently contributing to a high-quality dining experience. *Briar Patch Greenhouse*, Laborer (January 2021- September 2022). Oversaw the accurate placement of all plants and assumed responsibility for counting each item to ensure precise invoicing and payment. Proposed cost-saving measures by collaborating directly

with the owner to develop and implement more efficient, budget-conscious solutions for the company

EXTRACURRICULAR ACTIVITIES

Trust Scholars, Truist Business Scholars, Sound of the Sandhills Marching Band- Section Leader, Campbell University's Wind Ensemble, Campbell University's Wind Symphony, Campbell University Pep Band, and Mentor to underclassmen in the Big Camel/Little Camel Program. Enjoys music, golfing, disc golf, and watching hockey.

Ashlyn Baucom



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected Date of Graduation: May 2026 GPA: 3.17; Scott Ellis Merit Scholarship; Wiggins Norman Adrian & Mildred Harmon Scholarship; Truist Business Scholars Program Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship

WORK EXPERIENCE

Fiduciary Intern at Bank of New York (Summer 2025, Philadelphia, PA). Assisted with trust profile reviews and preparation of Trust Administration Committee memos. Completed a final project connecting internship work to BNY's *Pillars of Wealth*, highlighting integration of trust administration, financial planning, and portfolio management. Strengthened knowledge of portfolio management, financial planning, and trust administration through exposure to real client cases and fiduciary practices. Gained hands-on experience in wealth management concepts, estate settlement, and fiduciary oversight. Internship with Narron Wenzel, P.A. (August 2024-May 2025). Shadowed and learned the daily tasks of an Estate Attorney. Helped with legal assistant duties. Attended meetings with clients. Thanks a Latte Barista (July 2023-February 2025). Provided exceptional customer service with consumables and merchandise. Greeted and interacted with customers in a friendly and efficient manner. Accurately take orders and prepare coffee and tea beverages. Efficiently assisted customers within the boutique to find a product that fit their needs. Work closely with team members to provide adequate service and thorough opening and closing procedures. La-Z-Boy Furniture Galleries (May 2022-August 2023). Certified Retail Specialist. Completed the peak performance retail selling system training and product knowledge training. Utilized training to lead, guide, and direct customers to help them find a product that meets their needs. Assisted marketing management team with advertisements and creating social media content. Developed skills to identify target markets and design social media campaigns.

EXTRACURRICULAR ACTIVITIES

Co-Founder and Co-President of Women in Business Club, Truist Business Scholar, Alpha Delta Pi Iota Beta Chapter Member: Vice President of Operations (Present), Vice President of Membership Development, Director of Public Relations; Peer Mentor for Freshman Seminar in Lundy Fetterman School of Business, Campus Activity Board Event Planner, Microsoft Word, Excel, and Powerpoint Proficient, Canva Proficient

Brock Bidwell



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management: Expected date of graduation: May 2026; GPA: 3.8. Athletic Scholarship (Basketball), Thomas and Judy Folwell Trust Management Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certification.

WORK EXPERIENCE

Truist Estate Services Intern (May 2025-August 2025). Monitored current estates being settled by Senior and Junior Estate Advisors. Peer Reviewed books of business for 2 Estate Advisors. Assisted in off site client visits to handle Tangible Personal Property. Truist Estate Services Intern (June 2024-July 2024). Reviewed account fee schedules for Senior Estate Advisors' books of accounts. Co-authored 2 compliance procedures regarding Estate Administration. Participated in Estate Services team meetings handling accounts stretching through multiple states on the east coast. Youth Basketball Coach (June 2021-2026). Coached all Campbell University Basketball Schools dealing with children of all ages. Acted as a leader and counselor to help assist the campers in their basketball and living situations. Warehouse Crew (June-August 2021). Assisted in boarding, unloading, maintenance, and scheduling of drop offs and pickups for an international furniture shipping and receiving company. Learned to operate forklift and interacted with team members in keeping the warehouse on schedule of truck deliveries. West Forsyth High School Basketball Camp Counselor (June 2017-2021). Acted as camp counselor for elementary school campers. Handled daily activities and maintained a full day's schedule of coordinating food, pick up and drop off, and basketball.

EXTRACURRICULAR ACTIVITIES

NCAA Division 1 Men's Basketball, SAAC Member

Ethan Brooking



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning (3.625 GPA) and Masters of Business Administration (4.0 GPA): Expected date of graduation: December 2026; Dean's List, Scott Ellis Merit Scholarship, Fetterman, Lewis M & Annabelle L Business #1 Scholarship, Truist Business Scholars Program, William Andrew Tullis School of Business Trust Endowment, Southeastern Trust School Trust Management Scholarship, Fetterman, Lewis M & Annabelle L Business #2 Scholarship, Jenkins, Sue Weddle & B W Memorial Scholarship, Sauls, Dr Ernest P. Business Scholarship, Stephenson, Grace White & Gilbert Thomas Scholarship.

WORK EXPERIENCE

Gym Supervisor, Campbell Fitness Center, Campbell University, Buies Creek (March 2025-Present). Managing Student workers, maintenance of cleanliness and overall quality of Gym, and helping clients with their experience. Summer Corporate Intern, First Citizens Bank, Wealth Division, Raleigh (May 2025-August 2025). Reviewed and prepared accounts for audit, prepared presentations for Wealth Consultants, and cleaned up databases. Summer Intern Analyst, Wells Fargo Philanthropic Division, Winston-Salem (June 2024-August 2024). Reviewed Trust Agreements for distribution and restrictive language, researched charitable organizations to ensure compliance with government regulations, and created proper documentation for trust contracts to avoid legal complications. Delivery Expert, Dominos Pizza Inc (May 2023-Present (seasonal)) Excelled at Customer Service and building customer rapport for repeat business, had strong time management for completing tasks promptly, and adapted to changing conditions in the workplace. Assembly Team Leader, Eden Farms, (June 2020-Present (seasonal)) Assisted with inventory management, identified areas for improvement in efficiency and quality, and assisted coworkers to help better work ethic and product output.

EXTRACURRICULAR ACTIVITIES

Mentored a Business Administration group and provided them with ways to thrive and succeed in college. Participated in the Truist Business Scholars furthering my knowledge of the business world and creating connections with classmates. Lead Club Pickleball as Vice President. Participated in Club Spikeball and attended statewide tournaments. Participated in and was the captain of several intramural sports.

MacKenzie Campbell



EDUCATION

Campbell University, B.B.A in Trust and Wealth Management, Pre-Law, Minor in Financial Planning; Expected date of graduation: May 2026; Overall GPA: 3.62; Dean's List; Lundy Fetterman School of Business Trust Business Scholars Scholarship, Scott- Ellis Merit Scholarship, James A. Campbell Scholarship, Wiggins, Norman Adrian & Mildred Harmon Scholarship

WORK EXPERIENCE

Wunsch Law Firm from August 2025 to the present. Assisting on cases while sitting in on client consultations and doing any work the firm may need. Trust Fiduciary, Investments & Planning Intern, worked on analyzing special needs trusts while filling out MDA's, NMDA's, Trust Terminations, and more. Starbucks Employee from June 2023- June 2025, work cashier, form relationships with customers, build drinks, prepared store and inventory for each day, delegate tasks when needed to other

employees, and help to train new employees. Professionally coached figure skating for the U.S Figure Skating Association operated private lessons daily, managed profit, developed schedules, communicated with parents, and co-workers, and completed continuing learning education experiences. Coached Learn to Skate USA from years; 2018-2023. Planned classes and activities for students ranging from 3-65. Helped students develop figure skating skills as well as the confidence to speak in front of the class by playing games like Two Truths and a Lie and icebreakers. Worked at Dogwood Concession stand operating cash register, counting money, and keeping track of inventory.

EXTRACURRICULAR ACTIVITIES

Lundy-Fetterman Business School Business Trust Scholar, Campbell University Honors Program, Campbell University V.I.B.E Volunteer Club, Intramural Volleyball, Trust Fellows, Marketing Club, and compete in Business Ethics National Competitions.

Maddox Capps



EDUCATION

Campbell University, Masters of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2026; GPA: 3.761. Presidential Honor Roll, Dean's List, McNeil Chestnut Trust & Wealth Management Endowed Scholarship.

WORK EXPERIENCE

Intern Analyst, Wells Fargo (June 2024-August 2024). Completed annual account reviews, resolved open items, executed TMTs and TMMs. Drafted, reviewed, and completed Discretionary Action Requests for clients. Communicated with risk managers and administrators to resolve miscellaneous issues. Independent Contractor of Capps Painting & Services (June 2019-Present). Paint interior and exterior homes, stain decks and docks, pressure wash homes, and gutter installation/cleaning. Evaluate contracts and agreements with clients and

bookkeep the monetary revenues and expenses of individual jobs. Update clients on current and future stages of the job. Operate the project management of two employees and assist them with the job. Upon completion, the premises are thoroughly cleaned, and any other clients' needs are fulfilled. A variety of social media accounts such as Facebook and Nextdoor are used to network and market. Women's Basketball Head Manager and Practice Player, Campbell University (September 2021-Present). Oversees three managers by creating work schedules, delegating pregame and travel duties, and relaying information between coaching staff and managers. Assist with on court needs by setting up practice, promoting time efficiency, coaching, encouraging players, and participating in drills and game play.

EXTRACURRICULAR ACTIVITIES

Evolve Ministry Worship Leader (August 2025- Present). Plays guitar and sings two songs, biweekly, at worship service. Encore Bible Study Teacher (August 2025-Present). Studies, summarizes, and creates bible study interpretation for college students weekly. Works alongside other teachers to properly interpret and create visual presentations.

Jessica Coutts



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management Pre-Law, BBA in Marketing, BFA in Graphic Design, Minor in Financial Planning; Expected date of graduation: May 2026; Overall GPA: 3.54; Dean's List; President's List; Scott-Ellis Scholarship, Whitehead Lettie Pate Foundation Scholarship, Administrative on Campus Housing Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certificate

WORK EXPERIENCE

RBC Wealth Management, Private Client Group Intern (May 2025 - Present). Update and coordinate Salesforce and BETALink accounts. Check UMG wires and prepare investment policy exception reports. Draft professional emails for various audiences, including clients, colleagues, and external partners, ensuring adherence to company policy. Contribute to departmental efficiency by assisting

with mailing and filing projects. Research and responded to Financial Advisors' inquiries. H&R Block, Tax Associate / Client Service Professional (January 2024 - May 2025). Prepared state and federal tax returns for a variety of clients. Maintained accurate records and documentation of W2, 1095, 1098, and 1099. Schedule clients through AMP Appointment Manager. Aided in the sales of services and resolve issues or concerns with clients. Assist diverse clientele with a variety of backgrounds and financial needs. Centro Medico Latino, Administrative Assistant (June 2023 - February 2024). Documented and reviewed patient files to ensure accuracy. Communicated with medical facilities and institutions via phone and fax for referrals, medical records, and communicable disease reports. Data entry of medical information. Knowledgeable in immigration medical examination documentation. Responsible for sealing aforementioned forms to ensure document integrity. Uploaded I-693 Forms to Epic EMR system database. Transferred patient medical profiles from Quantum360 database to Epic Database. Careese Modeling Network Magazine, Head Graphic Designer and Copywriter (November 2021- January 2023). Collaborated with colleagues to develop a plan of action for future issues to fulfill client expectations and meet deadlines. Created visually appealing layouts for magazine pages, reviewed photos, and edited copy. Managed channels through which publication was sold and promoted.

EXTRACURRICULAR ACTIVITIES

Pineburr Yearbook: Head Graphic Designer, Campbell University: Peer Mentor, Criminal Justice Club: Member, Campbell University Residence Life and Housing: Graphic Designer, Mount Harmony Baptist Church: Nursery Worker, Martin Luther King Middle School: Sports Physical Assistant. Campbell University, Peer Mentor (August 2023 - December 2023). Created, organized, and administered lesson plans to a class comprised of 40 freshman students. Graded written

assignments in an orderly manner. Presented presentations in front of students twice a week. Arranged meetings with students and aided in their transition to the university.

Abigail Croom



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management Pre-Law, Minor in Financial Planning. Expected Date of Graduation: May 2026; Undergraduate GPA: 3.844. Graduate GPA: 4.0. President's List (Fall 2023 – Spring 2025), Dean's List (Fall 2022-Summer 2023), Luther H. Butler NC Baptist Scholarship, Emily Bratton MBA Endowment Scholarship. Certification: Truist Emerging Leaders Certification

WORK EXPERIENCE

Campbell University Lundy Fetterman School of Business; Graduate Assistant for The Lundy Fetterman School of Business Graduate Programs, Buies Creek, North Carolina (September 2025 – Present). Assist faculty and staff in daily administrative matters pertaining to graduate programs offered in the business school at Campbell University. Organize mailings and gifts for newly enrolled students. Audit transcript data to ensure students are properly enrolled in their respective graduate programs. Advocacy Trust; Trust Administration Intern, Mooresville, North Carolina (May 2024 – Present). Gained specialized knowledge in the practice of managing and administering Special Needs Trusts and Settlement Protection Trusts. Conducted research and analysis on trust documents, estate plans, and beneficiary requests to support Trust Officers and Trust Administrators. Organized documentation to perform trust account reviews, audits, and necessary accountings. Scheduled and coordinated meetings between vendors and clients for home repairs and other needs. Completed annual account reviews. Presented new account openings to executive leaders and performed onboarding processes based upon procedures. Processed trust account distributions of up to \$30,000 in accordance with trust provisions using various systems, including M-Files, SunGard AddVantage, and internal CRM software. Collaborated with Trust Officers to develop and implement strategies for optimal cash flow and growth of accounts. Gained exposure to fiduciary responsibilities and hands-on experience in financial planning and risk management. Mitigated risk by conducting federal safety research on vendors and beneficiaries to ensure safety of financial disclosures. Fostered team building skills through intern development programs that provided management advisement to interns across The Forge Companies. Presented an intern project on future business development ideas to executive leaders across The Forge Companies. Campbell University Office of Alumni Engagement; Annual Giving Student Worker, Buies Creek, North Carolina (March 2024 – May 2024). Assisted faculty with various year-round tasks involving alumni outreach and engagement. Broadcasted the annual Thank-A-Giver (TAG) Day across campus by tabling and arranging various signage to promote building strong community with donors. Utilized video technology each month to personally thank first-time donors for their generosity. Performed calls for annual gifting Phone-a-thons. Brown Dog Coffee Company; Team Lead Barista, Burgaw, North Carolina (December 2020 – December

2023). Prepared specialized drinks for customers, coordinated training for new hires, and supervised shifts of up to five baristas at a time as a team leader. Improved customer experience by assisting the manager in creating marketable and creative food and drink recipes. Efficiently processed cash, credit, and check transactions using a point-of-sale system. Created handmade signage for in-store use and outside events. Opened and closed the store, performing tasks such as cleaning, food and drink preparation for the next shift, and inventory logging.

EXTRACURRICULAR ACTIVITIES

Executive Treasurer of Campbell University's Student Government Association (SGA), Vice President of The Alpha Xi Chapter of Sigma Alpha Omega National Christian Sorority, Secretary of The Camel Chapter of Ducks Unlimited, Member of the Women in Business Club, Forest Hills Baptist Church Choir Member, Intramural Sports, Calligraphy, Painting, Proficient in SunGard AddVantage, Proficient in Microsoft Office Suite Technology.

McKenna Duncan



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2026; Planning to work towards a Master of Business Administration. Trust and Wealth Management Honor Society (August 2022 - Present) Scott Ellis Merit Scholarship (4 year recipient), Women's Lacrosse Scholarship (4 year recipient), Big South Commissioner's Academic Honor Roll 2023. CAA Commissioner's Academic Honor Roll 2024. Graduated from The McDonogh School, Owings Mills MD, 2022.

WORK EXPERIENCE

Campbell University Student-Athlete, Buies Creek, NC (August 2022 - Present). Safe Harbor Marina, Dockhand, Oxford, MD (May 2021 - August 2021). OC Fuel Dockhand, Ocean City, MD (May 2022 - August 2022). Assisted customers with fuel, pump out, and services at the fuel dock, docking assistance responded to VHF hails, made reservations, ran register, and assisted guests. Matt's Fish Camp Restaurant, Server, Fenwick Island DE (May 2023 - August 2023 and May 2024 - August 2024). Provided customers with excellent service ensuring their restaurant experience was memorable. Understood team dynamics and how to handle different personalities in a fast-paced environment. Able to manage conflict, prioritization, and ability to adapt. Constantly met the key performance indicators (KPIs) established prior to each shift. A few of the transferable skills learned from being a student-athlete and work experience are teamwork, communication, multitasking, patience, managing conflict as well as stress management. Comerica Bank Trust Intern, Raleigh NC (May 2025 - August 2025) Provided a deliverable after meeting with every team in the Trust lifecycle. The deliverable was focused on the New Business team with the account opening process. This project helped strengthen critical thinking, public speaking, and the ability to think on the fly. Meeting with every team of the trust lifecycle helped with the understanding of the trust process within a bank.

EXTRACURRICULAR ACTIVITIES

NCAA Division 1 Athlete, Campbell University Women's Lacrosse Team, Attack (August 2022 - Present). member of Army ROTC (August 2022 - May 2023). Youth Lacrosse Coach, Dark Horse Girls Lacrosse (May 2023-July 2024). Campbell Women's Lacrosse Captain 2026 Season

Jayden Giles



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2026; Overall GPA 3.4; Dean's List; Bank of America Scholarship, Gordon B. Rowland Trust Scholarship, Scott Ellis Transfer Scholarship, James L. White FBLA scholarship.

WORK EXPERIENCE

Carlie C's IGA, Meat Department Clerk, Coats, NC, Part Time Job; May 2023-Present. In charge of pricing and reducing meat based on quality of the product. Prepping meat to be cut or traying meat after it was cut. Organizing all items in department for neatness. Cleaning the meat department when co-workers finished cutting. Fulfilling any needs of customers to their satisfaction. Wells Fargo Bank, Estate Services Intern Analyst, Austin, TX, Paid Internship; June 2024-August 2024. Assisting on closing trust and estate accounts. Distributing correspondence between clients and employees. Collecting outstanding checks and paying bills for accounts in the closing process. Organizing documents of closed and open trust account and ensuring they are in possession of the correct trust officer. Triton High School, Football Coach, Erwin, NC, Paid Volunteer; June 2023-Present. Coaching and mentoring JV and Varsity Offense Line. Focused on teaching technique and developing players. Coached the group of young men at practice and on game days. In charge of grading them after their performance in games and finding ways to help them correct their mistakes. Stewart Farms, Farm Hand, Benson, NC, Part Time Job; May 2024-August 2024. In charge of cutting all the grass on the farm. Maintenance work such as painting wooden fences and repairing any damaged fences. Feeding and watering the cattle. First Rate Roofing, Salesman and Inspector, Raleigh, NC, Part Time Job; December 2023-March 2024. Traveled inspecting possible customers who had roof issues and would connect them to my Project Manager to close the sale. Fulfilled duties of door knocking sales in neighborhoods. Once booked with the company I would inspect the attic and roof and give an estimate to the client. NC Wesleyan University Student Athlete, Rocky Mount, Football Player; August 2022-May 2023. Carlie C's IGA, Bagger, Coats, NC, Part Time Job; August 2020-August 2022. In charge of filling needed items on the sales floor. Cleaning the entire store. Putting displays together and organizing endcaps. Bagging and helping customers with any request or needs they have. Some maintenance work of the store.

EXTRACURRICULAR ACTIVITIES

Lundy Fetterman of Business: Trust Fellows member, FBLA (high school): member. Kappa Sigma Fraternity Sigma Phi Chapter: Member and community service chair.

Christian Gilmore



EDUCATION

Campbell University, Master of Business Administration (proposed applicant). B.B.A. Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2026. Scott-Ellis Merit Scholarship, RA Housing Scholarship, Administrative On Campus Housing Scholarship.

WORK EXPERIENCE

Truist Wealth Brokerage Associate (Intern) (May 2025 – July 2025) I supported a brokerage team with client account management, investment research, and financial planning strategies. I assisted in preparing client presentations, analyzing portfolio performance, and developing tailored wealth management solutions. Through this experience, I gained valuable exposure to a strong network, financial markets, retirement planning, and risk management tools. **Group x Fitness Workout Instructor** (August 2024 - Present) In this job, I

demonstrate how to do various amounts of full-body dynamic workouts; to improve posture, flexibility, body strength, and balance. **Digital Media Student Worker** (August 2024 - Present) I assist all CAA sports with live camera footage and behind the scenes action; Including recording, audio, graphics, producing, directing, broadcasting and sideline reporting, for viewers streaming games virtually. **Campbell University Residence Life Community Assistant** (August 2023 - Present) For this job, I'm responsible for creating a safe, inclusive, and supportive living environment for students in my residence hall. My key duties include enforcing university policies, organizing social and educational events, and serving as a resource for students. I also address conflicts, and handle emergencies; using strong communication and problem-solving skills! **Special Needs Caregiver** (February 2020 - Present) Here, I provide in-home personal care for a 20-year-old woman with developmental and intellectual disabilities. My responsibilities include assisting with daily activities such as personal hygiene, meal preparation, and medication administration. Also, I help monitor health and behavior, while ensuring a safe-nurturing environment. **Summer Lifeguard** (April 2020 - August 2023) My main responsibilities included ensuring the safety of swimmers and guests in/on the pool deck. My key duties were monitoring water activities, enforcing safety rules, and responding quickly to emergencies; such as rescues or first aid situations. I also performed water rescues, and provided basic first aid or CPR when needed.

EXTRACURRICULAR ACTIVITIES

Women's Club Volleyball. 10 & Under Cheer Coach. SAVVI Brand Ambassador. Organized & Assisted Missions Trips & Service Projects in Guayaquil, Ecuador, and the Church of God

Children's home in Concord, NC. Gigi's Playhouse Volunteer. Student Broadcaster & Sideline Reporter

Richard Hager



EDUCATION

B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: Spring 2026; Overall GPA: 3.55; Dean's List; President's List; Scott-Ellis Scholarship, Truist Business Scholar, Dr. Ernest P. Sauls Business Scholarship, Southeastern Trust School Trust Management Scholarship, Fred G. Hale Memorial Business Scholarship, Harry T. Gatton Trust Scholarship, The J. Bradley and Kathy H. Creed School of Business Trust Scholarship

WORK EXPERIENCE

Wilson, Reives & Doran, PLLC, Sanford, NC, Summer Intern to Part-time Paralegal; May 2025-present. Supported Family Law attorneys by drafting legal documents, preparing trial notebooks, organizing evidence inventories, serving subpoenas, drafting deeds, and filing motions and pleadings with the court. Offered continued employment beyond the internship. Created a child support payment model to support case strategy and financial assessments. Rising-proficiency in Abacus Law. Served as a client liaison, communicating directly with clients to gather information and provide case updates. Offered part-time employment as a result of performance. Trust Advisors Institute, ATFA Certification Course, Buies Creek, NC, Student Intern; June 2024. Assisted a cohort of professionals studying for the ATFA. I assured their needs were met and made myself available to the attendees from the start of their day until the evening. This opportunity also allowed me to sit in on the ATFA course and gain exposure to materials concerning fiduciary principles, investments, estate planning, compliance, Subsection J, and more. Office Depot, Office Supply Store, Sanford, NC, Store Associate; July 2024-December 2024. Sales associate, Cashier, inventory, customer service, public relations, furniture assembly. YMCA of the Triangle, swimming pool, Lifeguard & Youth Swim Instructor; June 2022-July 2024. Certified in lifeguarding, Emergency Oxygen, Automated External Defibrillator (AED), First Aid, and CPR. I served my community by working at my local YMCA from my junior year of high school to the summer of my freshman year of college. I designed and taught a six-week swimming instruction program for children ages 3–5, an experience that was especially meaningful to me given my deep care and commitment to working with children. . Additionally, was put in charge of facilitating the Delta Grant, which was an effort the pool committed to in the Summer of 2023 to provide free water safety training for community children.

EXTRACURRICULAR ACTIVITIES

Lundy Fetterman School of Business: Trust Fellow, Finance Club, 1st place at the Templeton Ethics Case Competition 2024, Spoke and presented at Triton High School on behalf of Truist Business Scholars, panelist; LFSB accepted students' day. Campbell University: Student Government Association, Freshman Class Representative, Campus Pantry Volunteer

Logan Ladue



EDUCATION

Campbell University; Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2026. Graduate GPA: 4.00, Undergraduate GPA: 3.96. Honors & Awards: President's List Spring 2025, President's List Fall 2024, President's List Spring 2024, Dean's List Fall 2023, Janice Daniels & Clifford Russell Miller Scholarship, Becky T. Kelly Trust Scholarship, Southeastern Trust School Direct Aid Scholarship, Scott Ellis Transfer Student Scholarship, Admin VP Scholarship, North Carolina Need Based Scholarship. Certifications Acquired: Truist Emerging Leaders Certification. Central Piedmont Community College; A.A. in Business Administration. Date of graduation: July 2023. GPA: 3.82. Honors & Awards: President's List Fall 2022, Dean's List Spring 2023, Levine Scholarship.

WORK EXPERIENCE

Trust Administration Intern for First Covenant Trust & Advisors (Johnson City, TN, June 2025 – August 2025); Completed Pre-Acceptance Reviews for prospective trust accounts, analyzing client data, legal document provisions, and investment information to assess risk and profitability. Presented findings and recommendations to members of the Trust Committee for approval. Observed and participated in client meetings, gaining exposure to relationship management, business development, and handling client inquiries. Developed advanced Excel solutions using formulas, logic functions, Power Query, Power Automate, and ExcelScript to improve risk scoring, fee calculations, actuarial calculations, and compliance reporting. Assisted in implementing Salesforce Lightning by restructuring administrative workflows, account setup procedures, and distribution processes. Supported Trust Administrators through tasks such as beneficiary correspondence, drafting simple agreements, coordinating with service providers, and processing transactions. Intern Analyst for Wells Fargo (Winston-Salem, NC, June 2024 – August 2024); Conducted administrative account reviews for over 100 irrevocable trust accounts, requiring detailed interpretation of legal trust documents and provisions. Resolved outstanding review items by updating system codes, writing memo ticklers, correcting tax forms, updating client records, mailing beneficiary letters, and managing file documentation. Prepared and fulfilled discretionary distribution requests, including write-ups, depletion analyses, budget authentications, and submitting supporting documentation for approval. Gained proficiency with industry systems including SEI, Trust Gateway, Trust Navigator, FileNet, Fiduciary Client Correspondence, 3TMOX, MSFee Reporting, TMT/TMM, WealthNet, and Accurint.

EXTRACURRICULAR ACTIVITIES

Extracurricular: Campbell University; Business & The Bible Member, Campus Ministry Small Group Leader. Purdue University; Triangle Fraternity Brother. Volunteering: Young Life; Parkwood High School Leader. Vocational: Just Another Sport Dog PSA Club; Team Member, Competitor, Decoy/Helper. Hobbies: Chess Player, Bass Guitarist, Archer, Powerlifter, Brazilian Jiu-Jitsu Practitioner, 3rd Dan Black Belt in Taekwondo.

Bryson Lee



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: December 2025; Cumulative GPA: 3.789. President's List, Dean's List, Truist Emerging Leaders Certification, Scott Ellis Merit Based Scholarship, Dr. Ernest P. Sauls Business Scholarship, Marvin Drake Johnson Trust Management Scholarship, Mary Paschal Trust Management Scholarship, Major Sam Byrd Trust Education Scholarship, Carlton & Lynell Business Scholarship, Jessica N. White Endowed Scholarship

WORK EXPERIENCE

State Employees' Credit Union, Raleigh, NC, Trust Services Intern, May 2024 – August 2025 Examined members estate planning worksheets completed by Trust Representatives to determine fiduciary roles, and to determine eligibility to fit into SECU's Estate Planning Essentials Program. Scheduled Estate Planning Essentials

appointments for members. Prepared Discretionary Distribution Reviews for Trust Officers to be presented to the Trust Committee. Completed account synoptics and initial due diligence of potential new accounts. Rose & Graham Funeral Home, Funeral Service Assistant, September 28, 2021 - Present, Serving the areas of Benson, Four Oaks, and Coats, North Carolina. Assisted Funeral Service Licensees with day-to-day operations including removal of decedents from residences and medical facilities, preparation of decedents, assisting Funeral Directors with funeral services. Provided emotional support to families after a loved one has passed. Created playlists and background multimedia for funeral services. Greeting clients and attendees with compassion while also giving directions and instructions related to the funeral service. Developed proficiency in dealing with emotionally distressed people.

EXTRACURRICULAR ACTIVITIES

Member of Campbell University Trust Fellows, Golfing, Cooking, Banner Chapel Advent Christian Church Member and Volunteer

Charles Lewis



EDUCATION

Campbell University, Bachelor of Business Administration (B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected Graduation May 2026; Scott Ellis Merit scholarship, Administrative on Campus Housing Scholarship.

WORK EXPERIENCE

Wells Fargo Internship, Winston-Salem, NC (June 2025-August 2025) I got to work with Trust Administrators on trust accounts. Doing annual account reviews to make sure we had no high risk items or problems in the account. I got to sit in on some client calls and listen to how real-world problems would affect our work. I also worked on some discretionary distribution to beneficiaries providing details on why this discretionary distribution is allowed. Walmart, Personal Shopper, Rock Hill, SC (May 2024-December 2025). Organized orders into designated totes and later placed onto dollies based upon pickup or delivery.

Balanced taking out orders to customers who had arrived for their orders and answering phones for customers who would be arriving soon. Assisted managers with keeping a 3-minute delivery of all orders to the customer upon arrival. Papa Murphys, Crew, Rock Hill, SC (March 2022-August 2023). Would prepare ingredients for the day to come, greeted walk in and calling customers, received and placed inbound orders from customers, entertained customers while making their pizza, washed dishes, cleaned the restaurant by sweeping, mopping, and taking the trash out when needed, and balance the till when leaving or closing the store. Ann Springs Close Greenway, Camp Counselor Fort Mill, SC (May 2021-August 2021). Would welcome campers, planned and facilitated events, responsible for the care of 10-15 children.

EXTRACURRICULAR ACTIVITIES

Boy Scouts Of America Troop 925: Eagle Scout, Campbell University Club Soccer, Fishing, Camping.

Steven Mirabile



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, expected date of graduation: May 2026; GPA: 3.625, Rowland, Gordon B Trust Scholarship, Truist Business Scholars Program Scholarship, Campbell Football, Campbell University Student Athlete Advisory Committee, Truist Leadership Institute Emerging Leaders Certification

WORK EXPERIENCE

Campbell University Student-Athlete (July 2022- Present). Wealth Management Intern-Fiduciary Services at Busey Bank, Champaign-Urbana IL (2025). Supported Fiduciary Team members in the administration of trust and estates, assisting with estate settlement task and the preparation of client presentations. Actively participated in internal committee meetings to contribute to strategic discussions within Fiduciary Services. Conducted thorough analysis of legal documents for filing and recordkeeping purposes,

ensuring all materials adhered to current regulatory and compliance requirements. I was also able to spend time in the Edwardsville office to work alongside the Director of Fiduciary Services and the Director of Estate Settlement. Summer Intern Analyst (2024) at Wells Fargo Bank, Trust Client & Advisor Services Family Office, Minneapolis MN. Assisted in day-to-day duties of trust administration. Assisted in AARs, DARS, New Account Checklist, and various account management projects. Reviewed and comprehended legal documents and specific trust language. Trust Education Foundation Trust Advisor's Institute, Student Assistant (Summer 2023). Assisted instructors and students in the execution and maintenance of the ATFA certification course, and attended all classes given by these instructors. Nassau County Police Activity League, New Hyde Park, NY. Event Coordinator and Camp Counselor (2019-Present). At the PAL, I had many duties such as instruct, teach, observe, and supervise children playing various sporting events. I also had to serve as an office representative to plan and create ideas alongside my colleagues, parents and/or guardians.

EXTRACURRICULAR ACTIVITIES

Campbell University Football, Truist Business scholar, Campbell University Student Athlete Advisory Committee, Peer Mentorship program for Campbell's Business Schools Freshmen Seminar.

Jeff Neff



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected Date of Graduation May 2026; GPA: 3.586. Dean's List; President's List; Scott Ellis Merit Based Scholarship, Administrative On Campus Housing Scholarship, Men's Baseball T&F Scholarship, Benjamin M. Hawkins Trust Scholarship

WORK EXPERIENCE

Intern Analyst, Wells Fargo, Winston-Salem, NC (August 2025-July 2025) Contacted clients through email and phone call. Completed Administrative Account Reviews. Keyed through DARS requests and inputted money transfers within Wells Fargo's system. Worked hand in hand with trust officers and managers on a daily basis, ensuring quality work. Music Instructor, Cleveland High School, Clayton, NC (August 2024 - Present) Duties include teaching breathing techniques and brass fundamentals, running sectionals, assisting with full ensemble rehearsals. Head Visual Instructor, Northwood High School, Pittsboro, NC (August 2022 - Present). Instruct students on leadership and learning skills while simultaneously assisting the marching band build as a group. Have led the band to multiple first place trophies in statewide competitions over the course of the marching season. Shift Leader, Marco's Pizza (November 2018 - February 2021). Conducted operations throughout the course of the day including, but not limited to, food preparation, food orders, delivery routing, along with customer complaints and resolutions. Responsible for managing employees and upholding company standards during all hours of operation. Was entrusted with management of cash registers and store safes with the duty to balance out cash in/outflow each night before closing and securing the store at the end of the business day. Chatham County Parks and Recreation, Employee and Summer Camp Counselor, Pittsboro, NC (August 2018 - October 2019). Assisted with summer evening programs, weekend public events, and community holiday celebrations. Mentored children ranging from 4 to 14 years of age over the course of the summer. Organized team building events with the campers and other camp counselors in order to build a strong sense of direction for the counties' program moving forward.

EXTRACURRICULAR ACTIVITIES

Carolina Crown Drum and Bugle Corps Member and Administration staff, Campbell University Men's Baseball Manager, Campbell University Track and Field Manager, Sound of the Sandhills Marching Band, Campbell University Wind Ensemble

Grace Newby



EDUCATION

Campbell University, B.B.A in Trust and Wealth Management Pre-Law (4+1 Program with MBA); Fifth year, Master of Business Administration Student; Minors in Financial Planning; Expected date of graduation: May 2026; Undergraduate GPA: 3.283 & Graduate GPA: 3.308. Dean's List Fall 2022 & Spring 2024, Wells Fargo Trust and Wealth Management Scholarship

WORK EXPERIENCE

Graduate Assistant for Trust Planning Intern for State Employees' Credit Union in Downtown Raleigh (May 2024-August 2025). Work included reviewing estate planning worksheets, keying estate planning appointments through the Estate Planning Essentials Program. Assisted Trust Officers on completing Designated Distribution Requests and Depletion Analysis to present to TAC. Reviewed documents drafted by attorneys to interpret and analyzed them. Organized accounts and participated in weekly Trust Planning/Compliance and Trust Company meetings. Student-Manager for Campbell's Division I Men's Basketball Team (September 2022 – April 2025). Managerial work includes, setting up and breaking down practices and workouts. Assisted in the arrival and departure of student-athletes for home games, away games, and practices/workouts. During summer camp, worked the camp bank, which entailed of keeping up with over a hundred participants and each of their accounts while also keeping inventory of the items sold and not sold. Worked within a team of student-managers, the Director of Operations and Director of Player Development to ensure safe transfer of the athletic gear and equipment during practices, workouts, and games. Student Sales Associate for Campbell Athletics (September 2022 - April 2023). Handled and counted money before and after each sales day. Worked different sports teams on game day (i.e., football, women's basketball, and baseball). Start Teams Intern (November 2022 – May 2023). Worked with Author Nicole Fenner on marketing and blogging for her company Sister Girl Publishing. Working with April Kelly for her business Sure! Co. Sent emails and messages for her events.

EXTRACURRICULAR ACTIVITIES

Graduate Assistant for Campbell University Student Activities. Delta Phi Epsilon Alum.

Matthew Pennington



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management: Expected date of graduation: May 2025. Major GPA: 3.75. Recipient of the Scott-Ellis Merit Scholarship.

WORK EXPERIENCE

Campus Recreation Front Desk Associate (December 2024–Present). Provide front-line customer service and administrative support for Campbell’s recreation facilities. Responsible for welcoming and assisting students, staff, and visitors while ensuring smooth day-to-day operations. Developed strong organizational and interpersonal skills through daily client interactions. Keith Hills Golf Club Associate (September 2022–May 2023). Supported golf club operations in a client-focused environment. Assisted with customer service needs, maintained a professional environment for members and guests, and contributed to the efficiency of facility operations. Gained valuable

experience in building relationships and providing client-oriented service. Subway Team Member (December 2020–May 2022). Worked in a fast-paced, team-driven environment. Prepared food orders, maintained inventory, and ensured quality customer service. Strengthened multitasking skills, teamwork, and accountability.

EXTRACURRICULAR ACTIVITIES

Proficient in Microsoft Word, Excel, and PowerPoint. Historian (“Number V”) of the Kappa Alpha Order Fraternity, Zeta Psi Chapter. Manage chapter social media presence, coordinate alumni engagement, and plan events that foster connection and professional development. Active participant in intramural sports, demonstrating teamwork, leadership, and commitment to campus involvement.

Hayden Phaturos



EDUCATION

Campbell University, M.B.A (proposed applicant), B.B.A in Trust and Wealth Management, Minor in Financial Planning; Expected Date of Graduation: May 2026 GPA: 3.0; Men's Wrestling Housing Scholarship; Scott Ellis Merit Scholarship; Men's Wrestling Scholarship

WORK EXPERIENCE

Worked as an intern for Wells Fargo in trust fund management (June 1st 2025-August 8th 2025). I would show up around 8:30 every day, and ended the day around 5pm. I did a lot of trust account reviews, where I would read the governing document, look at the coding Wells Fargo had on the trust account, and fill out an account review to ensure the trust was being ran accordingly. I also looked over and filled out some discretionary requests for beneficiaries. They were called DARS, I filled them out and sent them to a co-worker for approval. Another major thing I did on the internship was called "Project Opti Code

54." O/C 54 was a code dealing with what the governing document said to do with income. All of the accounts I worked on were marked as "N/A" because the language was unclear. I read the document, and according to the guidelines I was given from the risk manager, would change to coding to what I believed fit best, a lot of it dealing with what to do with undistributed income. Work for Phillip's Loves Bears (July 2024- Present). Stuff and seal teddy bears with cotton for children. Package the bears into boxes. Clean the warehouse of the cotton or trash on the floor from working on the bears. Unload and load trucks full of boxes with packaged bears. Worked in Fruition Smoothie Shop (April 2022-July 2022). Washed dishes and put them away. Made fruit smoothies, fruit bowls, coffees, and a variety of toasts. Worked well with other coworkers. Would interact with customers daily ensuring them a happy experience at Fruition. Would always offer to carry the heavy boxes of fruit, bowls, cups etc. down into the basement so my coworkers would not have to. Would close shop ensuring that all the items were put properly back into place, the shop was clean, and locked.

EXTRACURRICULAR ACTIVITIES

Campbell Wrestling Team; Member, Liberty High School Wrestling Team; Volunteer Coach

Zach Rine



EDUCATION

Campbell University, Master of Business Administration 4+1, B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2026; Undergraduate GPA: 3.297, Graduate GPA: 4.00. Scott-Ellis Scholarship; Wiggins, Guyler, Harry John Business Scholarship; Scarborough, Todd R & Elva Trust Scholarship. Certifications Acquired: Securities Industry Essentials (SIE) exam, Brian Hamilton Foundation's Starter U Certificate.

WORK EXPERIENCE

Waiter at Abbey Roads Tavern and Grill in Fuquay-Varina, NC (March 2023- Present). Provide the customer with excellent service, ensuring their experience at the restaurant meets or exceeds their expectations. Must be able to communicate effectively in a fast-paced environment where working collaboratively, having a calm demeanor, and being able to multitask are paramount.

Project manager at Dockside's Bar and Grill (June 2019-August 2022). Focused on time management, assisting others in multiple areas, supplies, and completing various projects. Assisted in building two different restaurants with a team. Boot Rentals Specialist and Ski Technician at Ski Roundtop Mountain Resort (December 2018-March 2020). Helped customers whom it was their first time doing snow sports with their gear and educated them on having a fun and safe experience on the mountain.

EXTRACURRICULAR ACTIVITIES

President and member of the Phi Delta Theta Fraternity, North Carolina Zeta Chapter, Philanthropic supporter of Live Like Lou Foundation: Eagle Scout, Boy Scouts of America Troop 198, Intramural Sports

Aaron Spivey



EDUCATION

Campbell University, B. B. A. in Trust and Wealth Management, Minor in Financial Planning **Expected Graduation:** May 2026 | **GPA:** 3.9 Recipient of the Campbell Merit Scholarship (\$40,000). Earned recognition on both the Dean's List and President's List for academic excellence. Central Piedmont Community College, Associate in Arts in Business Management. **Certifications and Licenses:** Chartered Financial Consultant® (ChFC®); Licensed in Life Insurance and Accident & Health or Sickness Insurance

WORK EXPERIENCE

Wealth Estate and Legacy, Paraplanner – Charlotte, NC (Jan. 2022–Present) Supported senior financial planners in developing comprehensive financial plans tailored to clients' long-term objectives. Conducted tax research to support strategic wealth preservation and ensure regulatory compliance. Assisted in drafting estate planning

documents and advised clients on intergenerational wealth transfer strategies that minimized tax exposure. **Publix**, Produce Associate – Charlotte, NC (Jan. 2023 – Aug. 2024) Built customer loyalty through dependable service and product expertise. Led new team member training efforts, promoted food safety protocols, and maintained strict sanitation standards. **United States Navy**, Auxiliary Machinist Mate – Honolulu, HI (Jan. 2020 – Dec. 2022) Maintained and repaired submarine hydraulic and atmospheric systems vital to mission success and safety. Performed emergency diagnostics and interpreted complex schematics to troubleshoot mechanical systems under high-pressure conditions. **Panera Bread**, Production and Customer Service Associate – Charlotte, NC (Jan. 2019 – Jan. 2020) Prepared food and fulfilled orders accurately in a fast-paced environment. Delivered exceptional customer service while maintaining cleanliness and operational efficiency.

EXTRACURRICULAR ACTIVITIES

Active member of Campbell University's Trust and Wealth Management Program. Management of my personal real estate and oversight of family assets investment. Outside of academics and finance, I'm passionate about hiking, weightlifting, and personal development. I am currently studying for my Series 65 license.

Wade Sullivan



EDUCATION

Campbell University, Master of Business Administration Student, B.B.A in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2026; Dean's List, GPA: 3.25. Scott-Ellis Scholarship, Administrative on Campus Housing Scholarship, Prillaman, Gregory Lee Trust Bus Scholarship, Stephenson, Grace White & Gilbert Thomas Scholarship. Certifications Acquired: Brian Hamilton Foundation's Starter U Certificate, Truist Emerging Leaders Certification.

WORK EXPERIENCE

Arden Trust Company, Trust Intern, Dallas TX, (June 2025 – July 2025). Entrusted with doing administrative reviews for trust accounts, putting together a discretionary request memo, and then presenting the request to the Trust Approval Committee (TAC). Analyzed trust documents to make synoptic records for lots of different accounts.

Collaborated with trust officers to settle an estate administration. Visited a home that was in the estate to oversee repairs and gather assets left behind. Talked with all executives of the company and participated in weekly team meetings such as Trust New Business Committee (TNBC), Trust Investment Committee, and Special Assets Review Committee (SARC). RBC Wealth Management, Financial Solutions Intern, Raleigh NC, (June 2024 – December 2024). Assisted two Financial Advisors with daily tasks such as filing reports for client meetings, reviewing client wealth plans, and overseeing retirement accounts and trusts. Entrusted with developing a marketing drip campaign for acquiring new clients. Presented to the marketing team for feedback and approval. Became familiar with wealth planning technology tools such as RBC Wealth Plan. Observed client meetings and interactions. Organized annual client event. Walnut Creek Country Club, Turf Management Assistant, Walnut Creek NC, (May 2022 – August 2022), (May 2023 – August 2023), (May 2024 – June 2024). Worked on a team that completed a series of tasks that dealt with making sure the golf course and club area stayed in pristine condition.

EXTRACURRICULAR ACTIVITIES

Member of Club Baseball, Intramural Sports, Proficient in Microsoft Office, Campbell Social Events

Abigail Tuyo



EDUCATION

Campbell University, B.B.A. Trust and Wealth Management, Minor in Financial Planning, expected date of graduation: May 2026; GPA: 3.818, Scott Ellis Merit Scholarship- Junior, Administrative On Campus Housing Scholarship, Bank of America School of Business Trust Scholarship, Athletic Book Scholarship, Women's Volleyball Scholarship.

WORK EXPERIENCE

Fiduciary Summer Internship with Caldwell Trust Company (June 2025-July 2025). Internship provided real-world experience in taxation, fiduciary relationships, client-facing meetings, portfolio management, and investment management. Campbell University Student-Athlete (July 2022-Present). Student-athlete duties include time management for studies, long endurance practices, lifting, and treatment scheduling. MultiFamily nanny (May 2024-August 2024). Nannyng for multiple families

included managing six different children's personalities and individual wants. Provided transportation and food for each of the three families, as well as administering creative activities for entertainment. Jason Farmer Livestock Personal Assistant (March 2022-May 2022). Assistant services included sorting and reconciling financial statements for company gas and credit cards, payroll sheets for employees, reconciling each of the four business accounts on QuickBooks software, learning how to manage multiple different companies along with their books, and sorting paperwork for each employee. Freedom Nutrition Nutritionist Assistant (February 2022-March 2022). Gained knowledge in customer service, money management, and payroll for a small business, as well as the importance of compliance with health and safety codes.

EXTRACURRICULAR ACTIVITIES

NCAA Division 1 Women's Volleyball, Proficient in Microsoft Excel, PowerPoint, Word, Google Docs, and QuickBooks; Hobbies include: coaching young girls volleyball lessons, traveling to new places with family, and spending time with my dogs.

Savannah Tyndall



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning: Expected date of graduation: May 2026: Dean's List, Scott-Ellis Merit Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, RA Housing Scholarship, Narron, James W & C Gray Johnsey Trust Scholarship, Administrative on Campus Housing Scholarship. Certifications Acquired: CPR and First Aid Certificate and Truist Emerging Leaders Certificate.

WORK EXPERIENCE

Graduate Assistant for Campbell University Student Union (August 2025 – Present). Prepare facilities for campus held events, as well as clean-up and storage of Campbell owned property. Early Careers Wealth Management intern for Wells Fargo Bank N.A. (June 2025 – August 2025). Responsible for obtaining internal and external tax documents. Created Excel sheets showing stock profile valuations and linked account governing documentation to present during client and internal team meetings. Tasked with uploading documents into the electronic filing system and following protocol procedure for original governing documentation. Fiduciary, Investments, and Planning intern for Truist Bank (May 2024 – August 2024). Prepared estate analysis' for client meetings. Comprised an excel sheet to condense approximately 100 clients' Will file information. Entrusted with client interaction. Community Assistant for Campbell University Residence Life and Housing (August 2023 – May 2024). Responsible for system student check-in and check-out for on-campus housing. Implemented community building programs and events. Conduct Health and Safety checks to ensure the proper and safe use of Campbell's facilities. Responsible for responding to mental and emotional crises, along with guidance for educational and facility issues. Caregiver and Educational Tutor, Kinston NC (May 2023 – August 2023) (May 2022 – August 2022) (August 2020 – August 2021) Responsible for the safety and entertainment of children ages two to seven along with the educational furtherance of ages seven to seventeen. Campbell Campus Recreation Official (August 2022 – Present) and Supervisor (October 2022 – Present). Responsible for facilitating on campus student-interactive sports events while maintaining a productive and friendly environment. Instructing other officials and students in rules, regulations, and equipment management. Piggly Wiggly Cashier, Kinston NC (April 2019 – July 2020). Entrusted with customer interaction, along with unloading, stocking, and blocking store products. Aided in making and displaying store sales tags and in office management tasks, such as counting and recording cashier till amounts for record purposes.

EXTRACURRICULAR ACTIVITIES

Intramural Sports, Proficient in Microsoft Word and PowerPoint, Attended and Assisted in Organizing Campbell Social Events.

Claire Witt



EDUCATION

Campbell University Master of Business Administration (proposed applicant), B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2026; GPA: 3.797. Dean's List. CAA Commissioner's High Honors Academic Honor Roll. Scott Ellis Merit Scholarship. James A. Campbell Scholarship. Wiggins Norman Adrian & Mildred Harmon Scholarship. Truist Business Scholarship. Davis Family Foundation Scholarship. Women's Lacrosse Scholarship. Nicholas Colleluori Award Headstrong Foundation 2024.

WORK EXPERIENCE

Morgan Stanley Wealth Management Intern (May 2025-August 2025,) Optimized advisor-client outreach for a \$1.2B book of business by leveraging Salesforce CRM to deliver scalable touchpoints that strengthened multi-generational relationships and drove new asset acquisition. Developed a dynamic Excel reporting tool to track market

data and evaluate covered call option strategies, enabling portfolio managers to make informed, data-driven trading decisions. Streamlined coordination between financial advisors and CPAs for UHNW clients by consolidating hundreds of alternative investment fund 1099s and K-1s into comprehensive tax-reporting packages, enhancing efficiency and the client experience. Collaborated with the team's CFP®s throughout the financial planning process—from client discovery to plan presentation—by gathering data, running Monte Carlo analyses with proprietary software. Beast Elite Youth Lacrosse Coach and Assistant Recruiting Director (2023-Current,) Coaching and instructing lacrosse to female youth athletes. Assistant recruiting director to include program development for students interested in collegiate lacrosse.

EXTRACURRICULAR ACTIVITIES

Athletics: Campbell University Women's Lacrosse, Division I Program (Coastal Athletic Association Conference,) Student-Athletic Advisory Committee (Vice President SAAC,) USA Lacrosse High School All American. Lundy Fetterman School of Business: Truist Business Scholar, Omicron Delta Kappa. Community Engagement: SAAC Events (Community Service/Athletic Volunteer,) Buies Creek Elementary School Volunteering, Pleasant Union Christian Church, Giving Day (Top number of donors received for Campbell University in Fall of 2023). Certifications and Training: Securities Industry Essentials (SIE) Exam, Morgan Stanley PWM Financial Planning Specialist, American Red Cross CPR Certification, USA Lacrosse referee.

Paul Wright



EDUCATION

Campbell University, B.B.A in Trust and Wealth Management, Minor in Financial Planning: expected date of graduation May 2026; Overall GPA; 3.2 Scott-Ellis Merit Scholarship, Myrick, Doris P & Ray L business Scholarship, Newkirk Family Trust Management Business Scholarship, Phi Delta Theta First Generation Student Scholarship.

WORK EXPERIENCE

Double LL Tack & Feed Warehouse Supervisor (November 2020-Present) As Warehouse Supervisor, I am responsible for managing feed rotation to ensure optimal quality and overseeing comprehensive logistics operations, including distribution, inventory management, and inspections within the warehouse. I also facilitate work conferences and train new staff members to ensure that all warehouse associates perform their duties with effectiveness. McDonald's crew trainer (May 2020-

November 2020), I trained new crew members on operational procedures and best practices for efficiently and safely completing customer orders. Additionally, I maintained food quality standards and ensured the kitchen's overall cleanliness. Stanly Funeral Home (June 2018-July 2019) I supported families by managing relationships and providing emotional assistance and support during grief-stricken times. Additionally, I prepared gravesites to ensure they were clean and presentable for families and assisted with the setup and takedown of funeral equipment.

EXTRACURRICULAR ACTIVITIES

Former Vice President of the Phi Delta Theta Fraternity North Carolina Zeta Chapter. Brotherhood Chairman and Fundraiser Chairman of Phi Delta Theta Fraternity North Carolina Zeta Chapter. CAB engagement Member and Planning Coordinator.