



CAMPBELL
UNIVERSITY

Lundy-Fetterman
School of Business

Trust & Wealth Management

2026 – 2027

Intern 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

Raymond Allen
Aaron Anderson
Katelyn Batson
Sophie Blankenship
Joshua Bronson
Jacob Carroll
Nicholas Clark
Matthew Conway
Dallas Cutts
Yared Duncan
Matthew Ebien-Pesa
Gregory Emerson
Jared Evans
Paul Fuller
Justus Gilbert
William Gliptis
Jackson Greene
Bobby Harris
Adam Hay

Josiah Holder
Cooper Jeffrey
Ava Kanaar
Henry Kitchings
Sydney Konkler
Christian Lee
Ethan Mearing
Xavier Myles
Lillian Quesinberry
Jonathan Schindler
Tyler Smith
Hayden Sullivan
Brianna Wesley
Faith Whitt
Marshall Williams
Christopher Wray

Raymond Allen



EDUCATION

Campbell University, B.B.A in Trust and Wealth Management and minor in Financial Planning. Candidate for the MBA Program, Expected date of graduation: May 2028 Cumulative GPA 3.52, Presidents List Spring 2024, Dean's List Spring 2025 and 2026; Scott Ellis Merit Scholarship, Sauls Dr Ernest P. Business Scholarship, Admission Leader Scholarship, Kelly, Becky T Trust Management Scholarship.

WORK EXPERIENCE

First Citizens Bank, Institutional Asset Management Intern, Raleigh, NC, (May 2026-July 2026). Assisted in improving the organization and efficiency of client relationship management tools. Supported efforts to identify and develop potential new clients for the bank through a public funds project and presented findings to executive and senior leadership. Created a training module to help onboard and educate new employees on how to

complete a participation agreement plan. Lowes Foods Meat & Deli Department Stocker, Raleigh, NC, (June 2022-Present). Helped with weighing, stocking and keeping track of dates for meat and deli items along with keeping inventory once a week. Assisted customers with any questions or concerns about any food. Made sure to organize and clean meat and deli departments by the end of the day in addition to learning how to use various machinery in the deli department to slice cheese and turkey. Campbell University Tour Guide; Camel Crew (March 2024- May 2026). Led group and individual tour twice a week. Briefly helped train new tour guides on how to do tours and drive golf carts. If not touring a group, Helping greet and direct guests along with answering phone calls in the admission office. Other tasks would include assembling daily visit bags and assisting with refreshment bar inventory. Doing this job helped improve my public speaking skills as well as my advertising skills since I had to convince potential students why they should attend Campbell. Nosoca Pine Ranch, Liberty Hill, SC, Camp Counselor and Aerospace Director (June 8th, 2025, July 6th, 2025). This job required me to teach and lead a variety of class activities for children ranging from 7 to 16 years old, with some activities being building model rockets or teaching kids how to play frisbee golf. Supervise at least 10 kids per week in a fast-paced environment by making sure they kept track of when they took their medicine, ensuring they get to bed on time along with deescalating any arguments or bullying. Also memorizing lines and rehearsing for plays to perform for children.

EXTRACURRICULAR ACTIVITIES

Member of Campbell University Future Business of America delegation, Council of State Treasurer for North Carolina Student Legislature, Secretary of Public Relations for Campbell Club Soccer, Member of Black Student Union, Raleigh Navigator Pathfinder club Junior Counselor, Oak City Care Volunteer Member.

Aaron Anderson



EDUCATION

Campbell University, Master of Business Administration, BBA in Trust & Wealth Management and Finance, Minor in Financial Planning; Expected date of graduation: December 2027; GPA: 3.611; President's List; Dean's List; Scott Ellis Merit Scholarship; Mulkey, Edith C & Raymond L Jr Scholarship; Sauls, Dr Ernest P. Business Scholarship; Campbell University Need-Based Grant; Residence Life Scholarship.

WORK EXPERIENCE

YMCA of the Triangle, Finance & Accounting Intern, Raleigh, NC (June 2026 – August 2026). Shadowed financial leadership across Accounting, FP&A, Treasury, and Procurement to observe real-time decision-making and cross-functional collaboration. Participated in recurring finance rhythms, including department meetings, month-end close touchpoints, and budget/forecast discussions. Observed interactions with internal stakeholders and external partners to understand relationship management and communication flow. Gained exposure to nonprofit financial operations, including governance, donor restricted funds, capital grant management and endowment stewardship. Supported general accounting activities, including reconciliations, journal entry preparation, and variance analysis under supervision. Assisted FP&A with trend analysis, dashboards, and ad hoc financial modeling. Contributed to endowment and investment accounting, including reporting for a \$21M portfolio. Participated in procurement projects, including RFP processes and policy review. Southern Cruise & Travel, Assistant, Garner, NC (November 2020 – August 2025). Coordinated National and International group trips up to 90+ travelers. Demonstrated empathy and critical thinking to ensure clients are prioritized. Modernized brochures and itineraries. Managed client information regarding flight requirements. Recognized for exceptional communication and interpersonal skills in communicating with a diverse clientele. Created client presentations with Excel, Word, OneNote, and PowerPoint. Jordan Driving School, Assistant, Raleigh, NC (July 2022 – August 2024). Supervised a staff of 30+ driver education instructors and coordinated logistics for over 100+ students annually, ensuring efficient scheduling, safety compliance, and instructional consistency. Maintained ongoing communication with 30+ instructors to address accidents, student behaviors, and operational responsibilities effectively. Managed the inspection, supplies, maintenance, and readiness of a fleet of 60+ vehicles limiting downtime by 15%-20% and assuring 100% availability year-round.

EXTRACURRICULAR ACTIVITIES

Finance & Investing Club, Student Investment Fund, Pickleball Club, Indoor Soccer Club, Midway Baptist Church: Event Volunteer

Katelyn Batson



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 2028; Undergraduate GPA: 3.644. Dean's List (Fall 2024 – Spring 2026), Scott Ellis Merit Scholarship, Marvin Drake Trust Management Scholarship, Henry E & Mebla L Hinson Williams Scholarship, Dr. Earnest P. Sauls Business Scholarship, Jean L Jones LFSOB Trust Education Endowment, Mary Paschal Trust Scholarship, Southeastern Trust School Trust Management Scholarship, Campbell University Alumni Business Fellows Endowment, North Carolina Association of Rescue and Emergency Medical Services Scholarship

WORK EXPERIENCE

Campbell University Lundy-Fetterman School of Business, Student Engagement Graduate Assistant, Buies Creek, North Carolina (August 2026 - Current) Assists with coordination and administration of BADM-100 (Freshman Seminar Class). Supports programming for the Rose Center for Peer Mentorship in partnership with the Director of Leadership Development. Collaborates with the director and coordinator of the Trust Business Scholars on programming and outreach. Works with the Office of Career Development on events, including Career Fairs, Industry Days, and workshops. Documents events and activities to support social media initiatives Pendleton Square Trust Company, Trust & Estate Intern, Brentwood Tennessee, (June 2026 - August 2026). Supported the Trust and Estate teams in daily fiduciary administration by handling client inquiries, facilitating beneficiary requests, managing file documentation, and tracking assigned projects. Assisted with the processing of various transactions of up to \$500,000 such as funds transfers, beneficiary distributions and bill pay, recording communications, creating reports for internal and external use, and ensuring compliance requirements are being met. Collaborated on-site estate visits and client field work, assisting with property inspections, asset inventorying, and face-to-face consultations. Monitored daily reports to ensure account liquidity and accuracy of fiduciary administration transactions. Supported business development by participating in meetings with prospective clients and assisting on projects related to new business initiatives or research under supervision of trust officers. Campbell University Office of Alumni Engagement, Student Engagement Officer, Buies Creek, North Carolina (February 2026 - May 2026) Provided administrative support for Alumni Engagement using the Microsoft 365 Suite. Assisted in the planning and execution of alumni events. Fostered meaningful relationships between students, alumni and donors through events. Contributed to the Alumni Engagement's social media strategy and content creation Campbell University Campus Recreation, Aquatics Assistant, Buies Creek, North Carolina (August 2025 - December 2025) Supervises all staff of an indoor and outdoor pool during the absence of management. Coordinate weekly staff schedules to ensure adequate coverage and efficient shift distribution based on staff availability. Maintained professional, consistent communication through email, resolving issues and providing information to aquatics patrons. Create and maintain all marketing measures within aquatics. Assist in new hire interviews and the accurate completion of paperwork. Serve as liaison

between lifeguards, front desk workers and senior management, ensuring clear communication and alignment of goals. Lanier Hardware & Rental, Lead Cashier and Merchandising Associate, Burgaw, North Carolina (June 2020 - August 2025) Supervised all staff of up to 10 people during the absence of management. Oversaw daily operations of the cash register area, ensuring an efficient, accurate, and customer-friendly checkout process. Trained new and existing cashiers on procedures, customer service and hardware store products. Efficiently processed cash, credit, and check transactions using a point-of-sale system. Issued refunds, exchanges, and receipts to customers through cash or card methods. Addressed customer complaints and concerns. Completed accurate counts of end of day till amounts for recordkeeping. Stocked shelves and promoted store products to meet customer needs. Maintained a weekly accurate inventory count. Performed opening and closing procedures. Assisted in product related marketing through the store and social media. Campbell University Campus Recreation, Aquatics Center Front Desk Receptionist & Swim Meet Supervisor, Buies Creek, North Carolina (September 2024 - May 2025) Supervised swim meet day staff of up to 10 people for the duration of the event. Served as liaison between lifeguards, front desk workers and senior management, ensuring clear communication and alignment of goals. Greeted and assisted patrons, providing information on memberships, pool rules, and facility services. Provided information regarding pool hours, amenities, programs and upcoming events. Resolved customer concerns professionally, escalating issues when necessary. Enforced pool safety rules by communicating policies to patrons and reporting issues to management. Maintained the front desk area and monitored entry points to ensure only authorized guests accessed the pool.

EXTRACURRICULAR ACTIVITIES

Trust Business Scholar, Co-President of The Camel Chapter of Ducks Unlimited, Secretary of The Alpha Xi Chapter of Sigma Alpha Omega National Christian Sorority, Assistant Teacher of the Westview Methodist Church Youth Sunday School, Trust Fellows Member

Sophie Blankenship



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected Date of Graduation: May 2028; GPA: 4.0; President's list; Scott Ellis Merit Scholarship, Housing Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, Truist Business Scholars Program Scholarship, Cumberland Community Foundation Scholarship, Luther Butler Scholarship, Snyder Memorial Baptist Church Foundation

WORK EXPERIENCE

First Covenant Trust & Advisors, Johnson City, TN, Summer Intern (May 2026 - August 2026). Acted in the role of a trust administrator by paying client bills, preparing and sending letters, and completing administrative tasks. Spoke with clients to provide updates and gather information, and participated in advisor meetings to observe client relationship practices. Lauren Ashley Salon Assistant, Dunn, NC (August 2025 – December 2025). Welcome clients and help connect them with their stylist. Answer phone calls, schedule appointments, and assist with client questions. Maintain product displays, fold towels, and oversee front desk responsibilities, including check-in, check-out, and payment processing. Sophie's Chocolate Lollipops, Owner, Fayetteville, NC (2021 - present). Create chocolate lollipops for any occasion: weddings, wedding showers, baby showers, school parties, high school prom, and any special holiday. Coordinate orders and delivery, manage finances, and use social media to help promote my small business (earned \$10,000 toward my first car at age 16). Babysitter and Nanny, Fayetteville, NC (2018 - present). Provide 18-25 hours/week. Care for children ranging from 4 months to 13 years. Ensure safety, support family routines, maintain household cleanliness, and build meaningful relationships through engaging activities.

EXTRACURRICULAR ACTIVITIES

Club Pickleball, Intramural Sports, Lundy Fetterman School of Business Truist Business Scholar, Trust Fellows, Business and the Bible, Marketing Club, Women in Business, Declaration Church Launch Team Member

Joshua Bronson



EDUCATION

Campbell University, Bachelor in Trust and Wealth Management. Expected date of graduation: May 2028; GPA: 3.280. Prillaman, Gregory Lee Trust Bus. Administrative On Campus Housing Scholarship. Scott Ellis Merit Scholarship – Junior. NC Baptist Scholarship Program.

WORK EXPERIENCE

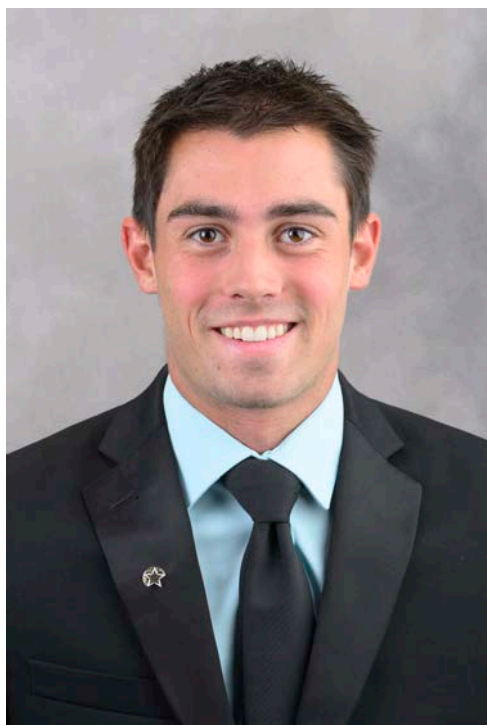
Gladwell Orthodontics, Barista, Wake Forest, NC (June 2023- Present) Provided professional level services in a fast-paced environment, responsible for inventory and supplies, while maintaining positive customer experience. Open Door Baptist Church, Raleigh, NC, (May 2022- Present) Demonstrated commitment and responsibility by providing consistent childcare supervision to children of all ages, CPR/First Aid Certified. Campbell University, Tech Crew/Set Builder, Buies Creek, NC, (September 2024- April 2026) Managed technical inventory and

configuration and deployment of critical A/V systems, set builder for highly visibility events. Kustom Koozies, Custom Print Administrator/Sales, Raleigh, NC (May 2024- August 2024) Managed order processing for high-volume custom orders, received in-person and online, ensuring accuracy and quality control in a demanding production cycle. Galaxy Fun Park, Attractions Attendant, Raleigh, NC, (May 2022- August 2023) Ensured guest safety, operated indoor attractions, and provided high-quality customer service.

EXTRACURRICULAR ACTIVITIES

Member of Phi Delta Theta Fraternity NC Zeta chapter: Treasurer, Avid Formula 1 fan; Videography; Musician (Clarinet, Bass, Contrabass Clarinet, Bass guitar and NCCSA Concert participant); Athletic experience in basketball, flag football, and martial arts; Competitive video gamer; played in high school Esports league.

Jacob Carroll



EDUCATION

Campbell University, Bachelor of Business Administration, BBA in Trust and Wealth Management, Specialization in Pre-Law. Expected date of graduation: May 2028. GPA: 3.0. Dean's List; Commissioners Academic Honor Roll with High Honors; Scott Ellis Merit Scholarship; Trust Management Alumni Award.

WORK EXPERIENCE

Town of Emerald Isle, Ocean Rescue Guard/Supervisor, Emerald Isle, NC, Summer 2024–Summer 2026. Served three summers as an ocean rescue guard and advanced to a supervisory role in the summer of 2026. Operated as a first responder through the fire department in coordination with 911 dispatch, emergency communications, paramedics, and local law enforcement. Responded to water rescues, first-aid incidents, missing-person searches, major medical emergencies, and other critical life-safety calls, requiring composure, sound judgment, and decisive action in high-

pressure situations. As a supervisor, led up to seven guards during emergency responses and was responsible for coordinating personnel, maintaining situational awareness, and supporting effective incident response. Coordinated extensive training exercises and helped lead a three-week Junior Guards program serving youth ages 9–12 and 13–17, providing instruction in CPR, basic first aid, ocean safety, and water confidence, in efforts to create a safer environment and develop situational awareness in an ever-changing environment.

EXTRACURRICULAR ACTIVITIES

Campbell University Division I Track & Field: Pole vault athlete competing at the collegiate level while maintaining a full-time academic workload. Balancing rigorous daily training, competition, travel, academics, and leadership commitments. Kappa Sigma, Sigma-Phi Chapter: Served as Grand Scribe and an executive board member for two semesters and philanthropic chair, balancing Chapter leadership responsibilities with academic and athletic commitments while coordinating chapter communications, community service initiatives, and philanthropic events supporting military heroes. Helped organize fundraising efforts that raised more than \$1,000 for military heroes, while participating in extensive community service, including maintaining the Chapter's adopt-a-highway and an on-campus trail. The Chapter later transforms the trail into a brother-led haunted trail fundraiser, with all planning, preparation, staffing, and execution completed by fraternity members to raise additional funds for military-related causes. Community Service: Volunteered with the MOM Clinic, assisting dental patients and supporting clinic operations.

Nicholas Clark



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: 2028; Overall Undergraduate GPA: 3.45; Scott Ellis Merit Scholarship; Administrative On-Campus Housing Scholarship. Clark, Paul Endowed Scholarship.

WORK EXPERIENCE

Modern Woodmen of America, Financial Intern; Raleigh, NC; May 2026 – Present. Support client outreach, prospecting, and business development initiatives while gaining hands-on experience in financial planning, insurance products, and client relationship management. Strengthen communication, sales, and professional networking skills while developing practical experience within the financial services industry. SIE Certified, May 2026. DoorDash, Delivery Driver; April 2026 – Present. Deliver customer orders efficiently while managing routes and schedules to ensure timely service. Maintain strong

customer service standards through professional communication and problem-solving in a fast-paced environment. Demonstrate time management, reliability, and attention to detail while handling multiple deliveries and meeting performance expectations. Yardsmith Landscaping LLC, CEO & President; Fuquay-Varina, NC; February 2025 – July 2025. Oversaw business development, client relations, and contract negotiations to support company growth and profitability. Led the strategic direction and overall operations of a full-service landscaping company specializing in residential projects. Directed branding and marketing initiatives to increase company visibility and attract residential contracts. Zips Car Wash, Sales Associate; Holly Springs, NC; February 2024 – August 2024. Oversaw daily sales operations while providing customer service and promoting additional services to maximize revenue. Monitored inventory to ensure product availability, coordinated end-of-day procedures, maintained organized work areas, and ensured compliance with safety and company standards.

EXTRACURRICULAR ACTIVITIES

Campbell University Club Basketball, Vice President; Campbell University Club Pickleball, Member; Campbell University Club Baseball Member, Campbell University Club Golf Member; Fuquay-Varina High School Varsity Basketball, Captain; National Honor Society.

Matthew Conway



EDUCATION

Campbell University, Buies Creek, NC, BBA in Trust & Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2028; Overall GPA: 3.50. Matthew is studying Trust and Wealth Management with a minor in Financial Planning. He is interested in a future career in financial advising and helping people with their financial goals. He enjoys being involved at Campbell and gaining experience that will help him in his future career.

WORK EXPERIENCE

Garden State Grill, North Carolina, Server; Matthew works as a server at Garden State Grill, where he has gained a lot of experience working with customers and communicating with people. His job includes taking orders, helping customers, answering questions, handling different situations, and making sure customers have a good experience. Working as a server has helped him

become more comfortable talking to different people, work well with others, and stay organized while handling multiple things at once. This job has also helped him build strong customer service and communication skills that he can use in his future career.

EXTRACURRICULAR ACTIVITIES

Kappa Alpha Order, Campbell University, Risk Management; Matthew is a member of Kappa Alpha Order and serves as the Risk Management officer for the chapter. He helps look out for the safety of more than 30 members and helps make sure events and activities are planned in a safe and responsible way. His position has helped him gain leadership experience and learn how to work with other members of the chapter. Matthew is also involved in Campbell University Men's Club Volleyball, where he works with his teammates and competes in a team environment. Outside of campus, he also participates in roadside and community cleanups, helping keep local areas clean and giving back to the community.

Dallas Cutts



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected Date of Graduation: May 2028; GPA: 3.81; President's list; Dean's list; Scott Ellis Merit Scholarship, Housing Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, Truist Business Scholars Program Scholarship.

WORK EXPERIENCE

The Commencement Group, Elk Grove Village, IL, Outside Sales Intern (May 2026 - Present). Executed high-volume, face-to-face outside sales operations, engaging with over 100+ customers daily and delivering persuasive sales pitches. Coordinated regional event logistics to ensure smooth execution and setup. Resistance Exteriors, Dousman, WI, Assistant Project Manager (Summer 2025-2026, Seasonal). Assisted Project Manager with daily administrative and field operations in a fast-paced exterior construction environment. Expedited job materials, coordinated site deliveries to support 10+ active job sites simultaneously, and scheduled inventory returns while maintaining accurate project documentation. Executed daily site cleanup, physical material handling, and logistics support to keep project timelines moving efficiently. Creek Coffee, Buies Creek, NC, Barista (April 2025 - Present, Academic Years). Handcrafted high-quality beverages for over 50+ customers daily in a fast-paced environment. Handled cash and processed transactions accurately while maintaining a clean, organized workspace. Managed inventory restocking and enforced food safety and sanitation standards. Collaborated with team members during peak rush hours to minimize order wait times and optimize overall customer experience.

EXTRACURRICULAR ACTIVITIES

Lundy-Fetterman School of Business Truist Business Scholar, Trust Fellows, Vice President of Women in Business Club, Marketing Club, Business and the Bible, Declaration Church Launch Team Member, Club Pickleball, and Intramural Sports.

Yared Duncan



EDUCATION

Campbell University, MBA, BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning, Expected Graduation: May 2028, GPA 4.0, President's List 4 times, J.A. Campbell Presidential Scholarship, Scott Ellis Merit Scholarship, Southeastern Trust School Trust Management Scholarship, Campbell University Alumni Association Business Scholarship, Mary Paschal Trust Scholarship, Tommy Aaron/Charlie Aaron Foundation Scholarship, Newkirk Family Trust Management Business Scholarship, Truist Business Scholars Program Scholarship, Wells Fargo Undergraduate Trust And Wealth Management Scholarship

WORK EXPERIENCE

Truist Bank, Fiduciary, Investments, and Planning Intern (May 2026-August 2026) Worked on closing accounts team, closed 35+ accounts. Gained experience with small trust statutes, successor trustee protocol, investment management accounts, ILITS, and IRAs. Shadowed Trust Advisors and participated in decision making calls regarding clients. Connected with professionals in areas such as investments, compliance, funeral services, fiduciary support, privately held investments, and IRAs. Participated in trust committee calls and gained experience in discretionary matters. AMC Dine-In Theater, Line Cook (June 2025 - August 2025) Certified in ServSafe Food Handling. Collaborated with a team to open/close the kitchen. Ensured compliance with safety standards. Specialized in grill operations during peak hours. Managed busy crowds of 500+ guests regularly. Trust Advisors Institute - Campbell University, Student Assistant (May - June 2025). Supported 50+ attendees with dorm logistics and campus orientation. Networked with wealth management professionals during lectures and workshops. Coordinated with campus staff to resolve safety and scheduling issues. Duncan Exterminating, Technician Assistant (Summers 2020-2023). Assisted with termite treatments and pest control routes, serving 50+ clients weekly. Improved office efficiency by organizing paperwork and creating customer estimates. Maintained company vehicles and equipment and managed inventory records.

EXTRACURRICULAR ACTIVITIES

Club Soccer President, Truist Business Scholar, Finance and Investment Club Treasurer, Phi Eta Sigma National Honor Society Member, Trust Fellows, Business in the Bible, Business School Reading Group, Gamma Iota Sigma Risk Management Member, Intramural Sports

Matthew Ebien-Pesa



EDUCATION

Campbell University, BBA Trust and Wealth Management; Overall GPA: 3.62. Dean's List; Paschal, Mary Scholarship

WORK EXPERIENCE

Five Below, Register Assistant (July 2026- Present) Being ever-present to customers entering or exiting the store. Assisting many types of customers check out smoothly from small gestures to full help depending on their need. Balancing the use of six registers, making sure the appropriate payment type matches the customer's needs. Capital Ace Hardware, Customer Service (April 2020-October 2024) Assisted customers throughout the sales floor, providing respectful and attentive service. When called upon, making custom keys and filling propane tanks safely. Managed a high volume of customers in times of rush with quick problem solving and compassionate efficiency.

EXTRACURRICULAR ACTIVITIES

Tabletop RPG player and storyteller for seven years and counting. From telling stories with on the fly thinking to quick decision making as a player, creativity is constantly flexed. Making an entire world in minutes that players will explore by pushing every wall they see and needing to adapt to players' choices. Collaborate all of this together with everyone at the table, building group teamwork and confidence in the highly social environment

Emerson Gregory



EDUCATION

Campbell University, Junior Undergraduate student:
Expected date of graduation: May 2028; GPA: 3.25. Scott-Ellis Merit Scholarship, Hawkins, Benjamin M. Trust Scholarship

WORK EXPERIENCE

Pate Masonry Supply, Brick Yard Manager. Managed daily operations within the brick yard, including organizing inventory and overseeing customer orders. Prepared and coordinated orders to ensure materials were accurately assembled and ready for pickup or delivery. Developed organizational, time-management, communication, and problem-solving skills while handling responsibilities in a fast-paced work environment.

EXTRACURRICULAR ACTIVITIES

Mens Club Soccer, Intramural Sports

Jared Evans



EDUCATION

Campbell University — Buies Creek, NC. Bachelor of Business Administration (BBA), Trust and Wealth Management. Minor: Financial Planning | Expected Graduation: May 2028.

WORK EXPERIENCE

United States Army | November 2015 – October 2022
Progressive Leadership & Operations Experience. U.S. Army veteran with seven years of experience in leadership, operations management, data analysis, process improvement, and regulatory compliance. From November 2020 to November 2021, served as a Medical Laboratory Technician in the Sinai Peninsula, Egypt, supporting a high-volume international military mission and performing and documenting 20,000+ analytical tests across multiple laboratory disciplines. From November 2021 to August 2022, promoted to Medical Laboratory Sergeant at Fort Stewart, Georgia, where I supervised and developed a team

of 14 personnel, managed training and certification programs, coordinated daily operations, maintained performance and compliance records, and ensured adherence to federal and military standards. Throughout my military career, I developed strong skills in team leadership, data-driven decision-making, risk management, process optimization, confidential information management, and operational efficiency while consistently operating in high-pressure environments.

EXTRACURRICULAR ACTIVITIES

Campbell University Veterans Club, American Legion Riders

Paul Fuller



EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected date of graduation: May 2028; Overall GPA: 3.69; Dean's List; Scott-Ellis Merit Scholarship, Stephenson, Grace White & Gilbert Thomas Scholarship, Truist Business Scholars Program Scholarship, Temple Sloan Family Foundation Merit Scholarship.

WORK EXPERIENCE

Marco's Pizza, Pittsboro, NC, Apex, NC, Cary, NC, Morrisville, NC, Raleigh, NC, Garner, NC, Assistant Manager; May 2022-August 2026. Work included customer service, creating schedules for 40 employees, taking inventory, hiring and firing employees, fulfill customer's orders, handle all customer complaints, manage bank deposits, general managing of employees, and general managing of restaurants. LaVelle Landscaping & Washing, Staley, NC, Assistant Landscaper; April 2025-

November 2025. Assisted in lawncare and pressure washing for clients. Work included mowing, weed eating, blowing grass, blowing leaves, planting, minor excavation, pressure washing houses, pressure washing surfaces, and lawn cleanup services. Raleigh Baptist Association, Raleigh, NC, Disaster Relief Intern; October 2024-June 2025. Went to Western North Carolina to find what the region needed after Hurricane Helene. Collected and sorted donations from individuals and corporations. Organized teams to deliver donations to sites in Western North Carolina. Helped victims rebuild what they lost. Help spread the gospel throughout many fractured communities.

EXTRACURRICULAR ACTIVITIES

Lundy-Fetterman School of Business: Truist Business Scholar, Trust Fellows Member; Moons Chapel Baptist Church: Usher, Youth Leader, and Active Volunteer; Raleigh Baptist Association: Active Volunteer; Intramural Sports

Justus Gilbert



EDUCATION

Campbell University, BBA in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected date of graduation: Fall 2027; Overall GPA: 3.83. Dean's List; Scott-Ellis Merit Scholarship, Southeastern Trust School Trust management Scholarship, Grace White and Gilbert Thomas Stephenson Scholarship, Wells Fargo Trust and Wealth Management Scholarship, The L. Kimsey Mann, Jr. Living Endowment Scholarship. Pitt Community College, Associates of Arts; graduated in 2025; Dean's List.

WORK EXPERIENCE

Chick-Fil-A, Certified Trainer, Greenville, NC June 2022-present: Trained newly-hired employees in groups of 2-4 at a time, ensuring that proper standards and procedures were learned and implemented over a 7-10 day training period; Upheld procedures and corporate standards for up to 40 senior team members weekly; Interacted with hundreds of guests daily to ensure that they received the best quality of service; Managed general operations while working with large teams of other employees to ensure the smooth flow of business. Aramark, Student Lead Worker, Lillington, NC September 2025-Present: Worked in and adapted to a variety of different environments to serve students and staff of Campbell University; Served large groups of hundreds of guests while working in different capacities on a regular basis including serving food, creating a welcoming environment and operating in small to large-scale campus events. Mediation Center of Eastern North Carolina, Independent Contractor, Greenville NC, April 2026-August 2026: Handled the processing of multiple youth into the program; Managed multiple groups of up to 20 youth and directed them to complete their assigned community service projects; Taught anger management and conflict resolution classes.

EXTRACURRICULAR ACTIVITIES

Member, RANSOM; Member, Running Club

William Gliptis



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: December 2027; Dean's List; Scott-Ellis Scholarship

WORK EXPERIENCE

Trust Education Foundation, Buies Creek, NC, Student Assistant; May 2026-June 2026. Coordinated program logistics for the Trust Advisors Institute, an educational program for trust and financial services professionals, including registration, materials, and session scheduling. Supported program operations and assisted bankers and trust professionals from financial institutions across the industry. Kappa Sigma Fraternity, Sigma-Phi Chapter, Campbell University, Grand Treasurer; December 2025-Present. Manage a \$25,000 annual chapter budget, including financial records and member accounts. Collect and track dues, monitor expenditures, and provide financial updates to chapter leadership. Oversee vendor payments and collaborate with the executive board on budgeting and financial decisions. Burger 21, Cary, NC, Kitchen Manager; April 2021-August 2022. Promoted from dishwasher and line cook to grill cook and Kitchen Manager. Coordinated kitchen workflow, managed inventory and food quality standards, and supervised kitchen staff to ensure efficient daily operations. Johnny's Pizza, Cary, NC, Delivery Driver; August 2022-August 2023. Provided direct, client-facing service on every delivery, building rapport with repeat customers and resolving order issues on the spot.

EXTRACURRICULAR ACTIVITIES

Kappa Sigma Fraternity, Sigma-Phi Chapter: Head of Philanthropy; organize multiple fundraising events annually benefiting the Military Heroes Foundation, North Carolina Adopt-A-Highway Program: Volunteer; participate in organized highway cleanups each semester, maintaining a two-mile stretch of Highway 421.

Jackson Greene



EDUCATION

I am currently a student at Campbell University pursuing a B.B.A. in Trust & Wealth Management with a minor in Financial Planning. I expect to graduate in May 2028 and am a recipient of the Scott Ellis Merit Scholarship.

WORK EXPERIENCE

During the summer of 2026, I interned with Truist in Atlanta, Georgia, on the Privately Held Investments team. I worked on projects involving privately held real estate assets, including a lease audit, property research, and analysis. I also participated in property tours and observed dispossessory court proceedings, which gave me insight into the legal and operational sides of real estate investing. This experience strengthened my analytical, communication, and professional skills while giving me valuable exposure to wealth management and alternative investments. From May through August 2025, I interned at C.F. Smith Property Group in Pinehurst, North Carolina, a

commercial real estate firm focused on grocery-anchored properties. I underwrote potential acquisitions, conducted market research on housing developments, assisted with a cold-calling initiative for properties being marketed, and helped with a grocery-store development opportunity in Southport, North Carolina. This internship gave me a strong foundation in commercial real estate and taught me the importance of asking questions and continuously learning. In June 2024, I worked with NBC Sports during the U.S. Open in Pinehurst, North Carolina. As a PARAB, I recorded on-course audio near professional golfers during tournament coverage. The experience taught me how to work effectively in a fast-paced professional environment and helped me become more comfortable stepping outside my comfort zone. From May 2019 through August 2024, I worked at Mabry's Drug & Homecare in Hamlet, North Carolina, as an Oxygen Technician and Delivery Driver. I repaired oxygen concentrators, delivered medical equipment, and provided medications to patients who depended on reliable service. This position taught me responsibility, compassion, and the importance of building relationships with the people I served.

EXTRACURRICULAR ACTIVITIES

I currently serve as President of the Kappa Sigma Fraternity and have previously served as Vice President, Recruitment Chair, Philanthropy Chair, and Fundraising Chair. These roles have strengthened my leadership, communication, and organizational skills. I also helped plan and lead our Military Heroes Golf Tournament, which raised more than \$2,500 for veterans and their families. I am also a member of the Campbell Club Volleyball Team, and my interests include golf, fishing, basketball, and hunting.

Bobby Harris



EDUCATION

Campbell University, Bachelor of Business Administration in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2027; Cumulative GPA: 3.80. ITT Technical Institute, Knoxville, Tennessee: Associate of Applied Science in Drafting and Design, 2010; Associate of Applied Science in Multimedia, 2008. Adcock, James & Jennifer TWM

WORK EXPERIENCE

United States Air Force Reserve, Headquarters RIO Detachment 2, Joint Petroleum Operations, Yokota Air Base, Japan; Individual Mobilization Augmentee (August 2025 to Present). Supports joint petroleum planning for United States Forces Japan. Coordinates fuel requirements across service components and contributes to headquarters-level planning and continuity projects. Holds an active SECRET security clearance. United States Air Force, Pope Field, North Carolina; Staff Sergeant, Fuels Management (December 2011 to August 2025). Advanced through five positions of increasing responsibility: Fuels Mobile Distribution Supervisor, 43d Air Mobility Squadron (2022 to 2025); Noncommissioned Officer in Charge, Fuels Laboratory, 43d Air Base Squadron (2021 to 2022); Fuels Distribution Supervisor (2017 to 2021); Fuels Service Center Controller (2014 to 2017); Fuels Distribution Operator (2011 to 2014). Directed fuel receipt, storage, testing, and issue for a major airlift installation. Certified product quality and maintained accountability for multimillion-dollar inventories and equipment. Supervised, trained, and evaluated personnel. Completed three overseas deployments: Al Udeid Air Base, Qatar (2023), overseeing 11 million gallons of aviation fuel; Ali Al Salem Air Base, Kuwait (2016 to 2017), managing a 750-vehicle refueling fleet, 1.8 million gallons issued, and aviation gasoline support to 721 remotely piloted aircraft sorties; Transit Center at Manas, Kyrgyzstan (2013 to 2014), issuing 477,000 gallons of diesel to 440 generators and supporting 135,000 passenger movements through the closure of the installation. Awarded the Air and Space Commendation Medal, Air and Space Achievement Medal, Air Force Good Conduct Medal (three devices), and Afghanistan Campaign Medal. A to Z Monuments, Crossville, Tennessee; Web Platform Developer (2026 - present). Designed, built, and deployed the family business order and billing platform. Implemented payment processing and an invoice builder, four funeral home client portals, a staff portal, and a public order form. Maintains the platform in operation. City of Crossville, Crossville, Tennessee; Maintenance and Grounds keeping (2008 to 2011). Performed grounds upkeep and facility maintenance for municipal properties. Crossville Ceramics, Crossville, Tennessee; Shipping and Receiving (2005 to 2008). Operated forklifts and material handling equipment and processed outbound freight.

EXTRACURRICULAR ACTIVITIES

Church technical ministry: operates sound, presentation, and security camera systems for weekly services. Songwriting and music production. Running and strength training.

Adam Hay



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. (Expected May 2028). GPA: 3.887; President's List; Dean's List; Scott Ellis Merit Scholarship; Gordon B. Rowland Trust Scholarship; Administrative On-Campus Housing Scholarship; and RA Housing Scholarship.

WORK EXPERIENCE

Resident Assistant (RA), Campbell University, NC. (August 2025 – Present). Develops interpersonal and communication skills through resident interaction, including conflict resolution, persuasion, and public speaking. First Citizens Wealth Management Intern, Raleigh, NC. (May 2026 – August 2026). Rotated through the IRA and Estate Settlement teams, gaining exposure to retirement account administration and estate settlement processes. Assisted with Form 706 preparation and developed an understanding of fiduciary responsibilities, estate administration, and the processes involved in serving clients and their families. Private Landscaper, under the employment of Capt. Michael F. McNeill, Mooresville, NC. (May 2025 – August 2025). Developed adaptability while working with various tools and equipment, prioritized tasks across multiple projects, and completed detailed projects around the property, including the complete construction of a compost trough.

EXTRACURRICULAR ACTIVITIES

Senior Class Vice President, Campbell University Student Government Association, Student Government Association Academic Affairs Chair, Finance and Investing Club Analyst, Gamma Iota Sigma (GIS) Member, Campbell Wesleyan Foundation Member, WinShape Camps Volunteer Youth Counselor (Four years).

Josiah Holder



EDUCATION

Campbell University, Buies Creek, NC; BBA in Trust and Wealth Management; Minor in Financial Planning; Expected Graduation: December 2027.

WORK EXPERIENCE

The Avenue, Glass Runner / Bar Back, Raleigh, NC; March 2026 - Present. Kept bartenders stocked with clean glassware, ice, and garnishes throughout busy shifts, moving fast enough that service never slowed down. Cleared empty glasses and wiped down the bar top on a constant rotation, keeping the space clean and ready during peak crowds. Governors Club, Banquet Staff, Chapel Hill, NC; May 2025 - Present. Delivered service at private events and member functions, working with club members and guests. Coordinated with event managers and team staff to execute banquet operations. LETTS Go Water Sports, Dock Hand; 2022 - 2025. Assisted customers with boat rentals and launches, handled lines and dock operations, and maintained equipment and the

dock area. Garden State Grill, Host / Expo; 2024 - 2025. Greeted and seated guests, managed the waitlist and table flow, and coordinated food timing between the kitchen and servers. Campbell University Fitness Center, Desk Worker, Buies Creek, NC; September 2024 - Present. Provided customer service support and oversaw daily operations of the fitness center.

EXTRACURRICULAR ACTIVITIES

Kappa Alpha Order, Corresponding Secretary; November 2024 - Present. As Rush Chair, managed planning and budgeting for recruitment week and led a recruitment committee. As Social Chair, organized social events and maintained event budgets. Gamma Iota Sigma; March 2025 - Present. Founding member of the Delta Omnicron chapter. Club Pickleball; member. Club Soccer; member.

Cooper Jeffrey



EDUCATION

Campbell University, Master of Business Administration, B.B.A. in Trust and Wealth Management with a minor in Financial Planning: Expected date of graduation: May 2028; GPA; 3.03. Scott Ellis Merit Scholarship, James E. Witherspoon Trust Scholarship, Wallace, Jerry M. & Betty B. Trust Scholarship, Maloney, Eugene Trust/ With Bus Scholarship

WORK EXPERIENCE

State Employees Credit Union (May 2024-Current) - Member Services Officer, manage the front desk answering the phone, transfer calls to the appropriate department, answer basic financial questions, assist customers in making payment on loans and transfers. Truist FIP Intern (June 2026-August 2026); Worked closely with the Trust Administration team, closed different types of accounts such as Investment Management Accounts, as well as Trust Accounts. Play it

Again Sports-Sales Associate (June 2022-December 2023) customer assistance with sales, taking orders, stock shelves, taking inventory and store closing responsibilities. Bells Feed and Seed-Sales Associate (October 2021-June 2022). Customer support on the floor answering questions and assisting with purchases, watering and caring for plants, selling Christmas trees.

EXTRACURRICULAR ACTIVITIES

Graduate Assistant for the CU Trust Advisors Institute; duties included setting up and breaking down sites, assisted getting participants to and from their specified locations, answered logistical questions for the participants, audited fiduciary and trust related classes all week. Graduate Assistant for the Trust Advisors Forum in Pinehurst, NC. Responsibilities included registration/check in for participants, passed out registrant tags, restocking materials, and attended seminars throughout the week. A CU Trust Guide for Cape Fear High School group touring the CU campus, addressed the CFHS Students regarding the Trust Program at CU and answered questions. Youth chapel worker at Fayetteville Community Church. Hobbies include hunting, golf, and reading.

Ava Kanaar



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: 2028; Overall GPA: 3.44; Scott Ellis Merit Scholarship; White, Mackie, and Judy Folwell Trust Scholarship; T. Harry Gatton Trust Scholarship; Women's Soccer T&F Scholarship. International Baccalaureate (IB) Diploma Programme — High School; IB Diploma Programme recipient; graduated in the top 10% of the class.

WORK EXPERIENCE

Kanaar Financial Life Insurance, Spring Hill, FL — May 2026–July 2026. Gained firsthand experience in financial planning by observing client meetings and learning how advisors develop strategies based on individual goals and life stages. Sat in on discussions with clients preparing for retirement and a young couple planning to build a home and purchase investment properties. Answered incoming

client calls, listened to client questions, and observed how the advisor communicated financial and insurance options. Organized and maintained client and policy files, reviewed beneficiary and coverage information with the advisor, and helped prepare client records and documents for meetings. Developed a deeper understanding of retirement planning, life insurance, risk management, and personalized financial strategies. The Mustard Seed Deli, Land O' Lakes, FL — Manager. May 2024– July 2024 & May 2026– July 2026. Managed daily deli operations and customer service; coordinated employee schedules and workflow; organized food preparation and inventory; monitored product quality and cleanliness; trained and supported team members; and responded to customer needs and operational issues. Weeki Wachee Springs, Weeki Wachee, FL — Lifeguard. June-September 2023. Monitored swimming areas and guest activity to maintain a safe environment; enforced facility rules and safety procedures; responded quickly to emergencies and guest concerns; coordinated with fellow lifeguards during daily operations; and maintained vigilance throughout assigned shifts. Proficient in AI tools; knowledgeable in using AI effectively, responsibly, and appropriately to improve productivity and complete tasks through work.

EXTRACURRICULAR ACTIVITIES

Campbell University Women's Soccer — NCAA Division I Student-Athlete. Humane Society — Volunteer. Enjoy assisting with animal care and shelter activities; supporting staff and volunteers with daily tasks; maintaining organized and clean spaces; and providing attentive care to animals.

Henry Kitchings



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2028; GPA: 3.95. President's List (Fall 2025, Spring 2026), Dean's List (Fall 2024 – Spring 2025), Stephenson, Grace White & Gilbert Thomas Trust Scholarship, Scott Ellis Merit Scholarship, United Methodist Men's Scholarship, Sauls, Dr. Ernest P. Business Scholarship, Mae Murry G. Bruton UG Business Scholarship, ICFNC Corp Advisory Board Direct Scholarship NCICU

WORK EXPERIENCE

Arden Trust Company of Dallas, Summer Intern (June 2026 – July 2026). Gained hands-on experience across the full account lifecycle at a private trust company, including opening and closing client accounts, conducting account reviews, and supporting estate settlement administration.

Worked closely with trust officers to ensure accuracy and compliance throughout account processes, building practical knowledge of trust operations and fiduciary responsibility. Campbell University Nourish Market, Nourish Market Intern (September 2026 – Present). Serve in the Office of Spiritual Life supporting the Nourish Market, a campus resource for students, faculty, and staff facing food and basic-needs insecurity. Provide leadership on key initiatives, help plan and implement monthly programming, and coordinate volunteers for Open Market opportunities through Campbell Serve. Organize group volunteer efforts and donation drives across campus while serving as a consistent, engaged presence within the Nourish Market. Cox Farm, Farmhand (2021 – Present). Work under Milton Cox on a Black Angus cattle farm in Chatham County, North Carolina. Operate tractors and perform equipment maintenance to support farm operations. Feed and care for cattle, repair fences, and assist with various tasks essential to livestock and land management. Gain practical experience in agriculture, problem-solving, and physical labor while maintaining farm safety and efficiency. Pattern Seed Co, Loader and Forklift Operator (May 2024 – September 2025). Certified forklift operator responsible for loading and unloading seed, fertilizer, and lawn care products. Assisted customers in choosing grass varieties and provided guidance on general lawn care practices to ensure customer satisfaction. Maintained warehouse and equipment safety standards while supporting day-to-day operations.

EXTRACURRICULAR ACTIVITIES

Vice President of the Wesleyan Foundation at Campbell University, North Carolina Conference of the United Methodist Church Financial Stewardship Committee, Member of Campbell Engineering H.E.R.T. (Human Exploration Rover Team) at Campbell University; Capital District Representative in the North Carolina Conference of the United Methodist Church, Member of Kappa Alpha

Sydney Konkler



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected Date of Graduation: December 2027, GPA: 3.61; Dean's List, Scott Ellis Merit Scholarship; Paschal, Mary Scholarship; McNeil Chestnut Trust and Wealth Management Scholarship; Administrative On-Campus Housing Scholarship

WORK EXPERIENCE

Too Good To Be Healthy Employee (January 2026 - Present). Provides friendly and attentive customer service by assisting customers with menu selections and creating a welcoming environment. Prepares customized loaded teas and specialty drinks while maintaining accuracy, quality, and efficiency. Assists with daily store operations, including processing transactions, maintaining an organized workspace, and restocking supplies. Hillsdale Summer Day Camp Lead Teacher (May 2026 - August 2026). Supervised and supported campers throughout daily activities while maintaining a safe, organized, and positive environment. Led recreational activities while encouraging participation, teamwork, and positive interactions among campers. Worked closely with other staff members to manage daily responsibilities, address camper needs, and adapt to changing situations. Juice Shop Smoothies Employee (January 2024 - December 2025). Assisted with opening the store and preparing for daily operations. Prepared smoothies, took customer orders, and processed payments while providing friendly and efficient customer service. Demonstrated the ability to work effectively under pressure while maintaining accuracy and a high level of customer service. Babysitter (January 2021 - Present). Provides care for three children across two families while maintaining a safe and nurturing environment. Supports child development through age-appropriate activities and prepares daily meals in accordance with dietary guidelines.

EXTRACURRICULAR ACTIVITIES

Peer Mentor for Freshman Seminar in Campbell Business School, Women in Business Club Member, Microsoft Word and Excel Proficient, Canva Proficient.

Christian Lee



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management Pre-Law, Minor in Financial Planning; Expected Date of Graduation: May 2028; GPA 3.905. Dean's list (Fall 2025); President's list (Spring 2026); Scott Ellis Merit Scholarship, Wiggins, Norman Adrian & Mildred Harmon Scholarship

WORK EXPERIENCE

Trust Advisor Institute Campbell University, Student Assistant (May-June 2026) Checked in participants as they arrived and helped them get settled. Greeted attendees as they arrived, managed arrival logistics and assisted guests with moving their luggage. Answered attendee questions to make sure they were comfortable. Served as a liaison between the administration and attendees to ensure that they were having a pleasant experience. Audited fiduciary and trust classes held during the week. Kennel Assistant Coats veterinary (February 2024- April 2024) Maintained

clean and safe environments for animals by sanitizing crates and facility equipment. Provided care for dogs, including walking, feeding, and physical upkeep. Managed facility hygiene and waste disposal efficiently to uphold health and safety standards. Soccer referee for Nash County Parks and Recreation (March 2021- March 2024) Enforced official rules and laws of the game to ensure fair play and player safety. Made split-second decisions and resolved disputes calmly under pressure. Managed players and coaches at game-pace. Communicated with players and coaches to help maintain control of the field.

EXTRACURRICULAR ACTIVITIES

Club tennis member, Club soccer member, G.A.T.H.E.R member, avid goer to Declaration church, enjoy going to gym, and running.

Ethan Mearing



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Minor in Financial Planning. Expected date of graduation: May 2028. Overall GPA: 3.7. Presidential Scholarship; Dean's List Wells Fargo Endowed Scholarship; Golden Leaf Foundation Scholarship; Mary Paschal Scholarship Fund Recipient; Truist Business Scholar

WORK EXPERIENCE

KPMG LLP – Trust Tax Services, Providence, RI (June 2026 – July 2026). Prepared client-facing Word documents for Midwest Trust Company and worked on K-1 statuses to maintain precise and up-to-date tax records. Conducted extensive trust document reviews for simple, complex, and grantor trusts, analyzing legal documents to identify grantors, beneficiaries, and post-grantor-death provisions. Created detailed trust document review forms used by tax preparers,

synthesizing complex legal language into clear, actionable summaries that improved workflow efficiency. Developed specialized trust review forms for disabled and special-needs beneficiaries, ensuring accurate interpretation of trust provisions and compliance with beneficiary-specific requirements. Trust Education Foundation Graduate Assistant Pinehurst, NC (February 2026 – Present). Served as a Graduate Assistant for the Trust Advisors Forum, overseeing registration management, attendee support, and on-site coordination. Worked closely with trust and wealth management professionals throughout the conference, strengthening industry connections. Gained firsthand insight into current fiduciary practices and leadership perspectives from senior professionals in the field. Peer Mentor, Campbell University, Buies Creek, NC (August 2025 - Present). Mentor six first-year students throughout their transition to college life, providing academic, social, and personal guidance during their first semester. Facilitate one-on-one meetings and group discussions to help students build confidence, establish study habits, and navigate campus resources. Collaborate with faculty and Alumni to support student engagement, promote community involvement, and foster a sense of belonging within the Campbell community. Media Manager/ Team Member, Campbell University Club Golf Team, Buies Creek, NC (August 2024 - May 2025). Ran the team's social media, creating content that boosted online presence and follower engagement. Managed team branding and promotions during tournaments. Earned Jack Nicklaus Award (MVP) for leadership and positive team impact.

EXTRACURRICULAR ACTIVITIES

Truist Business Scholar, Risk Management Club Recruiter, Peer Mentor, Business and the Bible, Club Golf, Men's Club Baseball, Club Pickleball, Microsoft Word, PowerPoint and Excel Proficient, Study Abroad: Risk Management Program (London)

Xavier Myles



EDUCATION

Xavier Myles is a junior at Campbell University pursuing a degree in Trust and Wealth Management, with an expected graduation date of May 2028. His academic interests include financial services, wealth management, business, and developing the skills needed to work effectively with clients. Xavier previously attended Eastern Guilford High School in North Carolina, where he developed an early interest in leadership and teamwork through athletics and school organizations.

WORK EXPERIENCE

Xavier has gained professional experience through employment at Food Lion, where he has worked as a Cashier, Grocery Associate, Produce Associate, and Customer Lead. Working in multiple departments has provided experience with customer service, organization, teamwork, and adapting to different responsibilities. Advancement to the Customer Lead position has provided

additional responsibility and opportunities to communicate with customers and coworkers. These positions have strengthened his communication and speaking skills while providing experience working in a fast-paced business environment.

EXTRACURRICULAR ACTIVITIES

Xavier currently serves as Secretary of Phi Delta Theta at Campbell University. In this position, he supports chapter organization and communication while working with other members toward common goals. He has also participated in fundraising efforts for ALS and activities supporting individuals affected by the disease. Before college, Xavier served as Secretary of Beta Club at Eastern Guilford High School. Athletics has also played an important role in Xavier's development. He wrestled for three years in high school and served as captain of the wrestling team. As captain, he helped train new wrestlers and worked to set a positive example for teammates. Wrestling developed his discipline, teamwork, accountability, and leadership skills. Outside of school and work, his interests include staying in shape, listening to music, and spending time with friends. His current favorite band is Tame Impala. Xavier values friendship, sound learning, and rectitude. These values influence his approach to education, work, and leadership. After graduating from Campbell University, he plans to begin a career in the business or financial field and continue developing professionally. His long-term goal is to build a successful career that allows him to continue learning, work with others, and make a positive impact on the world.

Lillian Quesinberry



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Expected date of graduation: May 2028; Scott-Ellis Merit Institutional Scholarship; South Stokes High School; Dual Enrollment through Forsyth Tech Community College

WORK EXPERIENCE

Merrill Lynch, Bank of America, Winston-Salem, NC, Seasonal Client Associate; May 2026–August 2026. Organized Personal Wealth Analysis materials and Client Review Portfolios for financial advisor review and client meetings. Created and maintained Excel spreadsheets to track annuity accounts, account values and custodians, and debanning accounts. Collaborated with financial advisors and internal teams to process account openings, transfers, account documentation, and other client-service requests while maintaining accuracy, compliance, and confidentiality. Assisted with client profile cleanups,

account consolidation, client notes, and Morningstar reports in preparation for client meetings. Contacted annuity companies to obtain statements and assisted with the renewal of an annuity policy following missed payments. Scheduled client meetings and maintained financial advisors' calendars. Created worksheets for other Client Associates to organize Client Review reports and improve preparation for client reviews. Digitized and organized client statements and documents to improve recordkeeping and accessibility. Assisted with a client fraud-related call while coordinating with financial advisors. Assisted with updating and maintaining content for the Pitts-Watts Group website. Developed experience in client relationships, confidentiality, organization, and supporting the day-to-day operations of a wealth management team. Antique Store, Cashier; Handled customer transactions and balanced and closed cash registers. Organized cash and payment records for management. Assisted with calculating employee hours and preparing information used for employee payments.

EXTRACURRICULAR ACTIVITIES

Sigma Alpha Omega, PR & Design Chair and former Service Chair; Campus Activities Board, former Marketing Executive Council Member, assisted with event planning, marketing, and event budget development; Women in Business, former member; Nourish Market at Campbell University, Volunteer; Harnett County Animal Shelter, Volunteer; Hope Kitchen at First Baptist Church in Walnut Cove, NC, Volunteer. Personal interests include ATV trail riding, hunting, and fishing.

Jonathan Schindler



EDUCATION

Campbell University, Buies Creek, North Carolina. Pursuing a Bachelor of Business Administration in Trust and Wealth Management and a Master of Business Administration through the 4+1 program. Expected program completion: Fall 2028. Cumulative GPA: 3.08. Scholarships and honors: Scott Ellis Merit Scholarship; Administrative On Campus Housing Scholarship; Newkirk Family Trust Management Business Scholarship; Dr. Ernest P. Sauls Business Scholarship; Children of Wartime Veterans Scholarship; Peggy R. Lawrence Scholarship; President's List; Phi Eta Sigma Honor Society.

WORK EXPERIENCE

Wells Fargo — Wealth Management Intern. Summer 2026, 10 weeks. Worked with the Banking, Lending and Trust team in the Wealth Management division, with a focus on philanthropic trusts. Reviewed documents and assisted with reviewing court accountings for multiple types of trusts. Regularly used Microsoft Excel, PowerPoint and Copilot. Won the Sprint Innovation Challenge, an internal Wells Fargo nonprofit consulting competition. Assaggio's Pizzeria Ristorante — Dishwasher and Preparation Cook. Fuquay-Varina, North Carolina; April 2022–April 2026. Managed kitchen preparation, supply storage, dish flow and restocking. Prioritized competing tasks as the sole backroom worker and adapted to changing demands during each shift. Monitored inventory, alerted management to low supplies, and maintained clean, organized workstations and storage areas.

EXTRACURRICULAR ACTIVITIES

Kappa Alpha Order. Served as Purser and Parliamentarian. Managed budgets, member dues and financial reporting; maintained procedural order during meetings and supported adherence to organizational bylaws. Future Business Leaders of America. Previous chapter leadership experience. Competed nationally in summer 2024 and earned third place in an event competition. Fuquay-Varina Baptist Church. Volunteered at community events and assisted with audiovisual operations and technology support during weekly services.

Tyler Smith



EDUCATION

Trust and Wealth management major. Expected to graduate in the Spring of 2028. Scholarships so far include the Chick fil-a remarkable futures scholarship, Scott Ellis Merit Scholarship, and the Southeastern Trust Scholarship.

WORK EXPERIENCE

Participated in an internship at Morgan Stanley's Cardinal Point East group from July 1st, 2026, to August 7th, 2026. At this internship I learned how to understand the importance of client relationships and investment opportunities and how actual firms run things. I got to make my own reports and even present an investment presentation to the manager. Worked as a team member at Chick fil-a at Skibo Square in Fayetteville, NC since May of 2023. Built important skills such as teamwork and team building. Working this job has been a great way to build character help work with others in what can sometimes be a stressful setting to get things done.

EXTRACURRICULAR ACTIVITIES

Member of the finance club at the Campbell Business School. The club frequently looks at the stock market and what's going on to stay informed on the matter. Also volunteered in Upward Sports as a member of Lebanon Baptist Church, in this volunteer opportunity an entire slate of basketball games from 8 in the morning until 3 in the afternoon. This requires a lot of time and effort to not disappoint since the player base is comprised of kids and the program tries its best to give them the best understanding of sportsmanship, compassion and how to be Christ-like in everything they do outside of basketball as well.

Hayden Sullivan



EDUCATION

Campbell University, Bachelor of Business Administration in Trust & Wealth Management, Minor in Financial Planning. Expected graduation: July 2028. Recipient of the Fetterman, Lewis M. & Annabelle L. Business #2 Scholarship, Band Performance Scholarship, Miller, Janice Daniels & Clifford Russell Scholarship, and Pep Band Scholarship.

WORK EXPERIENCE

Sports Page Denver, Denver, NC, Busser: 2022–2026. Maintained cleanliness of dining areas by clearing tables and removing trash. Assisted servers with food and beverage service and communicated with customers to provide a positive dining experience. Trained new bussers on restaurant procedures and responsibilities.

EXTRACURRICULAR ACTIVITIES

Phi Delta Theta, North Carolina Zeta: Secretary. Attended the Kleberg conference twice. Participated in community service assisting individuals with disabilities, including building porches and cleaning yards. Raised \$2,000 through SplashAPhi fundraising efforts. Assisted with an ALS philanthropy event held in conjunction with a Campbell University baseball game: Campbell University Marching Band: 2024–2026, participating in Marching Band, Pep Band, and Wind Symphony. Performed at university athletic events and campus performances while developing teamwork, discipline, and time-management skills: High School Marching Band: Tuba Section Leader for two years during junior and senior years. Led and supported fellow tuba players during rehearsals and performances while helping maintain section organization, preparation, and performance standards.

Brianna Wesley



EDUCATION

Campbell University, BBA in Trust and Wealth Management, Minor in Financial Planning; Expected date of graduation: May 2029; Overall GPA: 4.00; President's List; Truist Business Scholars Program Scholarship, Scott Ellis Scholarship, James A. Campbell Scholarship, Wells Fargo Undergraduate Trust and Wealth Management Scholarship, Southeastern Trust School Direct Aid Scholarship, Coleman, Carl & Jewell Business Scholarship, Whitehead, Lettie Pate Foundation Scholarship – Direct Aid Scholarship.

WORK EXPERIENCE

CertainTeed, Oxford, NC, Finance Intern; May 2026–Present. Formulated cost savings modules for 30 projects in 2026 totaling ~\$3M and 47 projects in 2027 totaling ~\$8.6M in savings to be included in budget presentation to executive leadership. Closed out over 40 CapEx projects (\$4.5M in expenditures) to begin depreciation. Reviewed and adjusted inventory twice a month. Supported colleagues across departments and attended meetings with them. Lundy Fetterman School of Business, Buies Creek, NC, Student Worker – Media, Marketing, & Support Staff; August 2026–Present. Curated posts and stories for the business social media page. Collaborated with business staff for content. Photographed and engaged at events. Assisted administration with other tasks. CertainTeed, Oxford, NC, Finance Intern; June 2025–August 2025. Designed Excel spreadsheets to analyze operational data and identify reporting discrepancies. Matched good receipt and invoice receipt for over \$2 million dollars. Food Lion, Creedmoor, NC, Shopper; March 2023–April 2025. Shopped an average of 10 online orders in a timely fashion. Assisted customers in locating items and resolving issues, contributing to positive shopping experiences.

EXTRACURRICULAR ACTIVITIES

Trust Fellows member, Truist Business Scholar member, Business and the Bible member, Lundy Fetterman School of Business Peer Mentor, Philosophy, Politics, and Economics Reading Group member, GATHER member, Honors Volunteer Subcommittee member, Honors Social/Cultural Subcommittee member, Faith Harvest Church Youth Group leader.

Faith Whitt



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Pre-Law, Minor in Financial Planning; Expected date of graduation: May 2028; Scott Ellis Merit Scholarship, Lettie Pate Whitehead Foundation Scholarship, Administrative On-Campus Housing Scholarship.

WORK EXPERIENCE

Dose of Pasta, Cook/Server, June 2026–Present. Open and close the restaurant independently, handle cash transactions, count and balance cash drawers, and resolve conflicts independently when management is unavailable. Take customer orders, prepare food, and assist coworkers during busy periods.

EXTRACURRICULAR ACTIVITIES

Girls Fast-Pitch Softball Coach, January 2026–Present. Create practice plans and drills while communicating professionally with parents, hotels, and tournament officials. Plan and promote fundraisers and resolve player conflicts. Volunteer at Roxboro Assisted Living by purchasing, assembling, and delivering holiday gifts to residents during Valentine's Day and Christmas. Donate food and other supplies to the Blessing Box. Proficient in Microsoft Excel and Word, with experience using Excel for financial calculations, budgeting, and analysis through accounting coursework. Completed several Spanish courses.

Marshall Williams



EDUCATION

Campbell University, B.B.A. in Trust and Wealth Management, Pre-Law, Minor in Financial Planning. Expected date of graduation: December 2027. Overall GPA: 4.0. President's List, Fall 2024, Spring 2025, Fall 2025, and Spring of 2026. Scott Ellis Merit Scholarship, Truist Business Scholars Program Scholarship, Janice Daniels & Clifford Russell Miller Scholarship.

WORK EXPERIENCE

Student Worker, Campbell University Graduate Programs (August 24th, 2026-Current). Prepared mailings for graduating and newly accepted Graduate students. Tracked inventory and completed mailings. Coordinated Graduate Program social media promotion. Trust Administration Intern at Arden Trust Company in Dallas, TX (June 1st-July 24th, 2026). Prepared memos for approval of discretionary distributions, reviewed trust documents and accounts for compliance action items, performed a Monte Carlo

simulation for trust depletion in Excel, and communicated with trust beneficiaries by email to obtain and properly file documentation for trust administration. Self-employed as owner and operator of a landscaping business in Raleigh, NC (January 2024-present). Mowed and maintained landscapes in Raleigh and Holly Springs, NC; managed business finances in daily business operations; tracked business operations, income, and expenses using Excel; developed customer relations in work coordination, communication of expectations, and invoicing; cultivated time management skills. Student intern for the Trust Advisors Institute, a course leading to the ATFA certification (May 29th-June 7th, 2025). Attended courses relating to trust administration, investing, financial planning, fiduciary responsibilities, estate planning, and trust taxation during the program.

EXTRACURRICULAR ACTIVITIES

Campbell University Finance and Investing Club, Chief Investment Officer (CIO)/Fund Controller (February 2025-Present). As CIO, performed fundamental analysis of equities in various industries for presentations proposing purchase; maintained records of fund holdings; and communicated confirmed Fund investment decisions to the Faculty Advisor of the Fund. During tenure as CIO, the Fund grew from \$18,000 to approximately \$20,000, and an additional donation of \$25,000 increased total Fund AUM to over \$49,000. Developed proficiency with Microsoft Excel through development of Discounted Cash Flows (DCF) and Comparative Companies Analyses (CCA) for prospective investments, and improved public speaking and presentation skills through pitches of a total of seven equities to the Club for purchase, with six of the presented equities purchased. Performed DCF analysis on United Therapeutics (UTHR) supporting a "Hold" recommendation as a member of the CU CFA Institute Research Challenge team in Spring 2026. Licensed Reverend (Exhorter Rank) in the Church of God, August 2024-present. Obtained Exhorter's License following completion of the Church of God's Calling and Ministerial Studies (CAMS) program in the 2023-2024 academic year. Adult Sunday School teacher (October 2025-present) at the Garner

Church of God. Experience in the field of PC construction and maintenance from independent research during the COVID-19 pandemic. Constructed a total of four PCs, three by request and one for personal use.

Christopher Wray



EDUCATION

Campbell University, BBA in Trust and Wealth Management; Expected date of graduation: May 2028; Overall GPA: 4.0; Dean's List; President's List; Lundy-Fetterman School of Business; Thomas and Judy Folwell Trust Management Scholarship.

WORK EXPERIENCE

United States Marine Corps & Army National Guard, Various Locations, Senior Program, Training & Personnel Operations Manager; 2003–2025. Directed division-level operational strategy, multi-functional operations, and strategic exercise planning across 21 years of service, including Defense Support of Civil Authorities missions in the United States and international deployments to the Middle East, the Horn of Africa, and Central America. Led cross-cultural stakeholder engagement, operational risk management, and expeditionary logistics in complex global operating environments. Managed an annual

operating budget of \$550,000 aligned with \$1.2M in assets to optimize resource allocation across 100+ personnel. Oversaw curriculum and technical execution across 10 specialized training programs and launched a Small Unmanned Aircraft Systems (SUAS) training pipeline, certifying 20 operators in the first year. Implemented process improvements by reducing operating costs by 15% and sustained a 95% operational readiness rate through comprehensive infrastructure management, workflow optimization, and actionable data forecasting. Awarded the Combat Infantryman Badge, Meritorious Service Medal, three Army Commendation Medals, and four Army Achievement Medals. Wheeler's, Rome, GA, Senior Operations and Safety Manager; 2012–2017. Directed day-to-day manufacturing operations, safety programs, and workforce development for 95 production employees and seven delivery drivers across rotating shifts. Spearheaded enterprise operational transformations which increased production capacity by 300% and improved team productivity by 25%. Implemented Lean manufacturing methodologies and performance KPIs to streamline workflows without added labor expense. Engineered cost-optimized structural component systems for commercial and multi-family developments, increasing project profit margins by 5–7% while upholding strict quality and regulatory compliance standards.

EXTRACURRICULAR ACTIVITIES

Campbell University Student Veterans Club: President; Youth Athletics: Assistant Coach, Angier, NC U4 Youth Soccer League.