

Joseph F. Schmitz, Jr.

P.O. Box 380 Carroll, Ohio 43112

740-304-2688

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Education

Mount Vernon Nazarene University, Mount Vernon, OH

Pursuing a Bachelor's of Science Degree in Accounting and Finance

Minor - Financial Planning

Cumulative GPA: 3.8

Anticipated Graduation Date: May 2018

- Planning to obtain CERTIFIED FINANCIAL PLANNER™ designation after graduation
- Inducted into Delta Mu Delta/Gamma Delta National Honor Society, Jetter School of Business

Work Experience

Gilliland Lee Financial Group, Inc., New Albany, OH

Financial Planning Internship at independent wealth advisory firm

- Participated in client meetings where various investment opportunities were discussed
- Assisted in preparing financial plans
- Supported operational functions within firm

Joseph Schmitz, Sr. Contracting, Carroll, OH

- Operated various construction equipment
- Performed miscellaneous construction duties, including framing, painting, landscaping, installing flooring and roofing, brick work, drywall, electrical, and plumbing

MVNU, Mount Vernon, OH

Athletics Student Worker

- Captain of work crew for volleyball games, including organizing and managing workers, operating scoreboard, set up and tear down
- Supervisor of Weight room and Cardio room
- Intramural basketball referee

Extra-Curricular Activities

MVNU Men's Varsity Basketball

- Voted Team Captain Sophomore and Junior Years
- Top Student-Athlete Freshmen of the Year Award
- Volunteered with the team in the community through Habitat for Humanity, serving at the local soup kitchen, at Goodwill, and for the Knox County Salvation Army food drive and pantry stocking
- Member of Athletes in Action
- Global Leadership Summit Participant through MVNU athletics

Bloom-Carroll Youth Basketball Volunteer

- Planned, implemented, and instructed free basketball training sessions for community youth

Volunteer at Crossroads Church, Lancaster, OH

- Helped set up and tear down for church services
- Served with the church in the community at a local soup kitchen, cleaning up and landscaping disadvantaged neighborhoods, and collecting food and clothing for those in need

References

Ms. Kathy Gilliland, AIF®, Gilliland Lee Financial Group, Inc., 614-798-0508, kgilliland@glf4u.com

Mr. Jason Lee, AIF®, Gilliland Lee Financial Group, Inc., 614-798-0508, jlee@glf4u.com

Dr. Kelly Rush, CFP®, Associate Professor of Finance, Mount Vernon Nazarene University, 740-392-6868, krush@mvnu.edu