JAMES PALMER

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Education

Texas Tech University
- o Bachelor of Science in Personal Financial Planning, *Expected December 2018*
- o GPA: *3.38*
- o Course Work: *Risk Management, Asset Management, Retirement, Estate Planning, Client Communication*

South Plains College
- o Associate of Science, *Graduated 2015*

Experience

Intern   May 2017 – July 2017
True North Advisors   Dallas, TX
- o Research - Cash Flow Management Software
- o Data Entry and Clerical - Tamarac University, Advisor CRM, Schwab Advisor Center
- o Development of Client Questionnaire for Financial Planners

Office Manager   June 2015 - May 2017
The Select Group at Keller Williams Realty   Lubbock, TX
- o Administered client relations and processes through delegation and planning
- o Collaborated and consulted with leadership and team members
- o Tracked and forecasted company financials - QuickBooks Online

Pest Control Technician   January 2013 - May 2014
Gafford Pest Control   Lubbock, TX
- o Assessed and inspected residential and commercial property for infestations
- o Monitored and maintained property for residential and commercial clients
- o Determined short and long-term solutions for clients

Organizations

Red to Black   Treasurer
- o Peer to Peer Financial Coach, Facilitate financial literacy presentations on campus, Counseling sessions

Key Outreach Program   SORC Representative
- o Founding member of organization, Financial Literacy Presentations

Toastmasters International   Treasurer
- o Increased membership, Managed Membership Dues

Technology and Skills

Portuguese, Fluent	Two-year church mission in Northern Brazil, LDS Church
Tamarac University	Advisor CRM, Advisor View
Money Tree Software	Researched and Trained True North Advisors
QuickBooks online	Payroll, Reconciling, Financial Reporting
RightCapital	Researched and Used 30-day Trial for True North Advisors
Schwab Advisor Center	Beneficiaries, RMD, Cashflow
MoneyGuidePro	Comprehensive Financial Plan, Case Study