

# SAMANTHA MOCKFORD

## Financial Planner

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510.458.1466

Sacramento, California

**A compassionate professional who understands that financial planning is primarily about people.**

Seeking paraplanner or associate advisor position

## SKILLS

### **Fundraising and networking**

- Goals ranging from \$50K to \$180K annually
- Always raised excess of budget by deadline
- Grew donor pool from 60 to over 300 in initial 4 months
- Cultivated ongoing donor relationships for over 14 years

### **Presenting**

- Taught and facilitated groups ranging from a handful of people to 500+

### **Coaching**

- 73% of coached interns applied and were accepted to continue full-time

### **Cross-cultural and international communication**

- Lived and worked overseas on multi-national teams for 8 years
- Trained teams in conflict resolution and intercultural communication

### **Writing and editing**

- Wrote fund appeals and monthly newsletters to donors

### **Recruiting and interviewing**

- Worked alongside HR to interview and onboard new staff and interns
- Recruited, briefed, trained, and debriefed international teams
- Trained others in asking open-ended questions and discussing sensitive topics

### **Project management**

- Planned fundraising events and conferences (online registration, hotel contracts, and finances)
- Ran operations (budget, accommodations, schedule, reservations, insurance, transportation, etc.) for international teams

### **Mandarin Chinese**

- 7 years language education in China

## EXPERIENCE

### **Campus field staff, Cru — 2007-present**

#### **Israel, Irvine, Davis, China, Sacramento**

- Counseled hundreds of people, one-on-one
- Became an expert in cross-cultural communication
- Trained student leaders, interns, and new staff
- Taught groups ranging from a few dozen to several hundred
- Fundraised for salary, benefits, and projects
- Cultivated ongoing relationships with donors
- Ran operations for conferences and international teams

## EDUCATION

**Passed CFP exam March 2021**

**University of California,  
Berkeley extension (Dalton)  
2020-2021**

CFP Program

**University of California, Davis  
2003-2007**

Bachelors of Science  
Managerial Economics