

CYNTHIA HARRY

FINANCIAL PLANNER

CONTACT

EMAIL:
charry06@outlook.com

PHONE:
(616) 755-0814

ADDRESS:
118 Smith St Crystal, MI, 48818

EDUCATION

INDIANA WESLEYAN UNIVERSITY

GPA: 3.75
Marion, IN

*Business Administration-Personal
Financial Planning (Dec 2021)*

Relevant Coursework

Risk Management
Investment Planning
Intro to Income Tax Planning
Retirement/Benefits Planning
Creating the Financial Plan
Principles of Accounting I

Awards & Honors

Magna cum laude

MONTCALM COMMUNITY COLLEGE

GPA: 3.69
Sydney, MI

*Associate in Science (A.S.) Office
Administration (May 2018)*

Relevant Coursework

Office Administration
Document Production I, II, III
Records Management
Business & Technical
Communication

CAREER OBJECTIVE

Detail-oriented Financial Planning major (3.75 GPA) recent graduate of Indiana Wesleyan University, entering as an entry-level planner. Aiming to leverage a proven knowledge of asset management, debt financing, and financial planning skills to successfully fill the Financial Planner role at your company. Frequently praised as results-oriented by my peers, I can be relied upon to help your company achieve its goals.

EXPERIENCE

FPA Externship

FPA, Crystal, MI / Jun 2021 - Aug 2021

- Constructed an investment management portfolio
- Analyzed insurance policies and documents
- Discovered the financial planning assumptions found in financial planning software
- Differentiated ways financial planners approach the main areas of financial planning
- Established recommendations for student loan planning
- Evaluated the tax implications of various personal and financial decisions
- Determined the likelihood of success in different client retirement scenarios
- Modeled an estate plan
- Developed my personal philosophy of financial planning

Lead Person in Assembly

Stahlin Enclosures (RobRoy Industries, Belding, MI / Oct 2004 - Jun 2012

- Set-up workstations for employees on all shifts
- Trained new employees in Assembly
- Managed Automated Inventory System
- Assembled Enclosures

Transfer to Duoline (Sister Company in Texas)

Stahlin Enclosures (RobRoy Industries, Belding, MI / Jul 2007 - Jul 2008

Accounting for Small Business

Awards & Honors

Cum laude

Part-Time President's Honor Roll

Phi Theta Kappa Honor Society

CERTIFICATIONS

Microsoft Word 2013

Microsoft Excel 2013

Microsoft Access 2013

Microsoft PowerPoint 2013

NOTCI Administrative Assisting

- Trained employees Lining Plant
- Trained employees in FRP
- Produced liners for oil field
- Finished pipes with liners to send to customers

P-I-C/Cashier

Save-A-Lot, 48846, MI / Jan 2003 - Oct 2004

- Supervised over 3-4 cashiers
- Counted drawers at beginning and ending of shift
- Cashier
- Stock

REFERENCES

Mr. Christopher Moore

Professor

Indiana Wesleyan University

4201 South Washington St.

Marion, IN 46953

Christopher.moore@indwes.edu

Relationship: Professor Moore was my instructor for 2 of my Financial Planning courses, Retirement/Benefits Planning and Intro to Financial Planning.

Dr. Duane Kilty

Program Director: Financial Planning

Professor

Indiana Wesleyan University

4201 South Washington St.

Marion, IN 46953

765-506-1620

Duane.kilty@indwes.edu

Relationship: Dr. Kilty was my program director and instructor for 2 of my Financial Planning courses, Creating the Financial Plan and Risk Management Foundations.