

Zackary Smutzer

zack.smutzer@gmail.com

817-457-5975

EDUCATION

Texas A&M University

August 2020 - May 2024

Bachelor of Business Administration in Finance & Minor in Financial Planning

GPA: 3.3

CFP exam eligible, anticipate sitting for the July 2024 exam

WORK EXPERIENCE

Carter Financial Management Intern

June 2023 - July 2023

- Successfully located and reported over \$160,000 in lost client assets through the Texas unclaimed property portal
- Acquired proficiency in using Raymond James products and compliance protocols
- Attended client meetings across various teams and received mentorship from experienced CFP® practitioners
- Aided in operational tasks such as paperwork, email, document gathering, and processing CRM entries

Amplified Planning Extern

June 2023 - July 2023

- Gained hands-on experience in the main areas of financial planning
- Conducted financial analysis, and developed client deliverables on eMoney
- Learned the basics of Asset-Map, Redtail CRM, MorningStar Advisor Workstation, and Income Lab

Texas A&M University Resident Advisor

August 2021 - May 2022

- Successfully managed the move-in and move-out processes for over 500 students
- Led a diverse community of 35 students, ensuring their social and physical well-being
- Partnered with an advisor at Northwestern Mutual on a financial literacy workshop for on-campus students

LEADERSHIP

Financial Planning Student Association President

April 2021 - Present

- Organized bi-weekly speaker sessions featuring financial planning professionals from across the country
- Fostered a sense of community within the financial planning program by orchestrating regular social events
- Advocated for the needs and desires of the financial planning students to the department staff
- Collaborated with several different financial planning firms to connect them with students

Financial Planning Ambassador

February 2022 - Present

- Represented the financial planning program at Texas A&M to potential students and sponsors
- Attended bi-weekly lectures on the development of critical soft skills, time management, and professional wisdom

COMPETITIONS

Texas A&M University Present Plan Showdown

October 2023

- Competing against three student teams in presenting a financial planning case after receiving mentorship from a Holistiplan financial planner

Financial Planning Association Challenge Competitor

February 2022 - October 2022

- Achieved a 4th place ranking nationwide among competing universities
- Attained 1st place in a competitive quiz bowl, showcasing comprehensive financial planning knowledge
- Created a holistic financial plan for a sample client without the use of financial planning software

CERTIFICATIONS & RECOGNITIONS

Dalton Education CFP Exam Prep Award: Texas A&M University

September 2023

eMoney Fundamentals Certification: eMoney

June 2023

Gene Nelson Leadership Award: Texas A&M University

April 2023

Master Microsoft PowerPoint: LinkedIn Learning

March 2023

FinServ Foundation, Excel Conference Invitee: Carson Group

September 2022

Kyle and Brittany Noack Scholarship for Personal Financial Planning: Texas A&M University

April 2022

EXTRACURRICULAR

Alpha Psi Omega National Theatre Honor Society: College Station, TX

April 2021- Present