

NOAH OAKES

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EDUCATION

Bachelor's Degree in Business Administration Expected: May 2025
Kansas State University
GPA: 3.4
Major: Finance
Minor: Personal Financial Planning (capstone course required to complete all CFP education)
Certificate: Investment Management

CERTIFICATIONS & LICENSES

Series 66 Jul 2024
NASAA
Securities Industry Essentials (SIE) Aug 2023
FINRA
Bloomberg Market Concepts Apr 2023
Bloomberg

EXPERIENCE

Fidelity Investments Jun 2024 - Aug 2024
Brokerage Client Relations Intern | Raleigh, NC

- Provided assistance to 5-10 clients per hour in regards to investment account services while ensuring high levels of client satisfaction
- Collaborated with 4 other interns, included conducting quantitative and qualitative research to work towards delivering a solution to increase the client experience index
- Presented final capstone project to 6 high-level site leaders and other associates
- Shadowed financial consultants and other members of a wealth management team, meetings included preparation for client planning appointments
- Performed above the companies national performance metrics

Stadium Chair Co. May 2022 - Aug 2023
Office Intern/Assembly Crew Member | Lenexa, KS

- Assisted with sales analysis projects with the goal of finding sales opportunities
- Paced work to meet daily and weekly production goals to ensure orders were shipped to customer satisfaction

Wingstop Nov 2020 - Aug 2021
Crew Shift Leader | Olathe, KS

- Reported daily sales data, accurately reconciled cash drawers, and prepared daily shift reports to be communicated with management
- Delegated tasks, communicated expectations, and directed 5-8 employees on a daily basis to improve performance

EXTRACURRICULARS

FinServ Foundation Fellowship Program Aug 2024 - Present
Member

- Selective program dedicated to empowering and supporting the next generation of financial professionals
- Engage in mentorship program, webinars, conferences, and coaching

Student Finance Association Aug 2023 - Present
Member

- Student ran organization exposing members to firms in the industry with the goal of achieving financial acumen
- Cultivate advanced financial, networking, and professional skills that are essential to excel in the industry

Invest-A-Cats Aug 2023 - Present
Treasurer

- Hands on experience with portfolio management, including a student managed portfolio of \$75,000
- Exposure to equity valuation, bond valuation, portfolio diversification, mutual fund analysis, and identifying market trends
- Assist in making key decisions in regards to the student portfolio

Investment Club Aug 2021 - Present
Member

- Gain insight into the investment management industry with on-campus meetings led by industry professionals
- Discuss investment opportunities, market trends, and concepts to increase investment comprehension

Delta Sigma Phi Aug 2021 - Present
House Manager/Member

- Ensure the house cleanliness is maintained on a daily basis as well as communicating maintenance needs with other house managers to ensure our alumni corporation board is aware
- Participate in 2-3 philanthropic events per year with all proceeds going to charity