

# Cooper W. Thompson

469-626-2926 | cooperwilltho@gmail.com | linkedin.com/in/cooper12

## Education

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**Texas A&M University** | College Station, Tx

*August 2021 – Present*

Bachelor of Business Administration in Finance, Minor in Financial Planning

Expected Graduation, May 2025

GPA: 3.78

- CFP® Exam eligible upon graduation. Anticipate sitting for the November 2025 exam

## Experience

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**Keel Point** | Annapolis, Md

*June – August 2024*

### **Private Client Intern**

- Spearheaded the development of a streamlined investment strategy for the Annapolis office by interviewing advisors across the firm and conducting independent market research
- Delivered a formal presentation to senior wealth advisors, offering strategic recommendations informed by my research
- Shadowed senior advisors during client meetings and the financial planning process, gaining hands-on experience with industry software, including MoneyGuidePro

**The Cason Group** | Atlanta, Ga

*May – August 2023*

### **Group Benefits Sales Intern**

- Conducted market expansion research and created a 30-minute presentation for executives, identifying optimal markets for expansion based on prospective client data and market research
- Extracted data from Excel spreadsheets to identify market share and top-selling lines of insurance

**Effort, LLC** | Annapolis, Md

*June – August 2022*

### **Event Setup Team Member**

- Set up fencing for high profile events, including the 4th of July firework show at the Washington Monument
- Conducted thorough venue cleanups before and after events, with a focus on trash removal

## Leadership

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**Young Life** | College Station, Tx

*March 2022 – Present*

### **Leader at Navasota High School**

- Provide mentorship to high school students in personal development and faith
- Plan and facilitate weekly club meetings, including leading activities and delivering talks on spiritual growth and values

**National Student Leadership** | Washington, D.C.

*June – August 2024*

### **Congressional Fellow**

- Selected as part of an international cohort to participate in an 8-week fellowship on servant leadership, faith and values among a pool of competitive college-aged applicants.
- Engaged with current congressmen and former senators in an intimate setting, gaining insights on leadership and values through discussions and personal interactions.
- Volunteered 32 hours over 8 weeks with Little Lights, a non-profit serving underprivileged children in D.C.

**Atlanta Associates Program** | Atlanta, Ga

*May – August 2023*

### **Summer Enrichment Program Intern**

- Balanced full-time internship with mentoring sessions, networking road trips, and weekly meetings
- Scheduled meetings with accomplished individuals within the community, gaining professional and personal insight

**National Student Leadership Forum** | Washington, D.C.

*November 2022*

### **Leadership Forum Delegate**

- Represented Texas A&M at a leadership forum convened by members of congress from both sides of the aisle
- Discussed core leadership values alongside a diverse group of 200+ college students and distinguished leaders

## Relevant Coursework

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Financial Planning for Professionals, Tax Planning, Investment Planning, Retirement Planning, Financial Modeling, Investment Analysis, Managerial Finance, Business Finance, Financial Reporting