Jose Rocha

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540-522-8528
Culpeper, VA

EDUCATION

Virginia Tech, Blacksburg, VA   Expected December 2025
B.S. in Business in Financial and Wealth Management
GPA: 3.00

Germanna Community College, Fredericksburg, VA   August 2020 – May 2022
General Associate
GPA: 3.60, magna cum laude

WORK EXPERIENCE

The Externship,   June 2024 - August 2024
An eight-week program with Amplified Planning
- Gained hands-on experience in the main areas of financial planning: cash-flow planning, investment planning, retirement planning, college and student loan planning, insurance planning, estate planning, and tax planning
- Observed real client meetings, conducted financial analyses, and developed client deliverables on eMoney Advisor
- Became certified in eMoney Advisor and gained experience in Asset-Map, Redtail CRM, and Morningstar Advisor Workstation, which included live sessions with representatives from each company
- Earned five hundred hours toward CFP® Board experience requirements

Knights of Columbus, Fairfax, VA   August 2023 – March 2024
District Agent
- Cold-called potential clients and participated in the client acquisition process
- Assisted clients in filling out insurance applications
- Conversated with the client and prospected for information that can be used to lead them to a decision
- Hosted informational events to specific demographics to bring awareness to the effectiveness and vision of the Knights
- Participated in over a dozen client relation meetings like retirement, education, and insurance

VOLUNTEERING

Catholic Campus Ministry, Blacksburg, VA   September 2023 – Present
Extraordinary Minister
- Administering the Eucharist according to church canon law

Knights of Columbus, Blacksburg, VA   September 2023 – Present
Fraternal Member
- Raising money for ministry activities
- Volunteering doing yardwork on weekends

INTERESTS & OTHER SKILLS

Language
- Dual Citizenship (US and Portugal)
- Intermediate Portuguese

Certifications
- VA Life & Annuities/Health License
- eMoney Fundamentals Certificate