

Stephanie Glenn

www.linkedin.com/in/stephanietglenn

stephanietglenn@vt.edu

(757)-816-7730

Current Address:
Blacksburg, VA, 24061

Permanent Address:
Norfolk, VA, 23508

EDUCATION

Financial Planning and Wealth Management (CFP Track) Undergraduate Student at Virginia Tech Expected: May 2026
Overall GPA: 3.02/4.00

PROFESSIONAL EXPERIENCE

Financial Representative, Northwestern Mutual, Virginia Beach, VA May 2024 - Present

- Conducted 20+ client meetings to date, assessing financial goals, analyzing current financial situations, and providing tailored recommendations on budgeting, insurance, and retirement planning
- Creates and delivers customized financial plans using Northwestern Mutual's planning tools, integrating solutions for meeting savings goals, income protection, and legacy planning to meet clients' unique needs
- Completes daily outbound calls to potential clients, effectively communicating the value of Northwestern Mutual's financial products and services, and successfully setting up initial client meetings.

Chief Executive Officer, Innovate Living Learning Community, Blacksburg, VA Apr. 2023- May 2024

- Increased organizational membership by 20% through targeted outreach and engagement strategies, including the development of a comprehensive marketing campaign that effectively showcased the benefits of membership
- Successfully negotiated and secured a substantial increase in the organizational budget from \$16,000 to \$100,000 through persuasive communication skills, demonstrating strong leadership, and strategic goals
- Secures prominent guest speakers and key financial supporters through strategic networking enhancing the program's reputation and fostering valuable industry connections

Wealth Management Intern, Full Circle Financial Group, Virginia Beach, VA May 2023- Nov. 2023

- Collaborated with senior wealth managers in overseeing and optimizing a \$2.5 million portfolio, gaining hands-on experience in asset allocation, risk assessment, and investment decision-making
- Identified and implemented process improvements, leveraging MoneyGuide Pro and refining data collection methodologies, resulting in a 25% increase in team efficiency in tracking and reporting key performance indicators
- Applied advanced financial modeling techniques to assess and optimize portfolio allocations, resulting in more informed and data-driven investment strategies

Digital Marketing and Engagement Specialist, Special Olympics, Blacksburg, VA Dec. 2022- Nov. 2023

- Assisted in recruiting 200+ participants for the 2023 New River Valley Polar Plunge event, helping raise over \$74,000 for the Special Olympics non-profit organization
- Proficient in developing and executing digital marketing strategies, creating engaging content, managing media platforms, and advertising to enhance the organization's presence
- Coordinated and organized promotional events, leveraging digital platforms to connect and engage with community members and leaders, and maximizing participant's experience

Accounting Intern, Sentara, Virginia Beach, VA Jun. 2021- Jun. 2022

- Earned the Top 10 Most Excellent Internships Award out of 100 students by exceeding goals and project expectations
- Generated customized financial reports using QuickBooks, providing management with clear and insightful information on financial performance, aiding in strategic decision-making
- Facilitated the digitization process of physical documents, utilizing QuickBooks to convert paper files into online databases, enhancing accessibility and streamlining the collection of client information in the workplace to maintain accurate records

EXTRA-CURRICULAR & VOLUNTEER EXPERIENCE

Chi Delta Alpha Community Service Sorority May 2023- Present

- Leads and coordinates impactful service initiatives within Chi Delta Alpha and the broader community and contributes a minimum of 32 hours per semester to engage and involve members in various volunteer opportunities

Special Olympics Virginia May 2023- Present

- Provides support to Special Olympics athletes with intellectual disabilities and fosters an inclusive and encouraging environment to promote physical activity and social engagement

Collegiate Women in Business Sep. 2022- Present

- Engages with a network of driven and ambitious women to develop leadership skills, attends professional development workshops, and participates in networking events with industry professionals

CERTIFICATIONS

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- VA Life, Annuities, and Health Insurance License Mar. 2024- Present