

Israel Cruz

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Lubbock, TX 79416

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Education

Texas Tech University, Lubbock, TX Anticipated Graduation - Spring 2018
Master of Science in Personal Financial Planning
Graduate Certificate in Charitable Financial Planning - Candidate
GPA: 3.70

Angelo State University, San Angelo, TX 2016
Bachelor of Science in Exercise Science - magna cum laude
Minor in Spanish

Professional Experience

Red to Black Peer Financial Coaching, Lubbock, TX 2016 - present
Peer Financial Coach

- Present over responsible financial behaviors to a group of 25 people or more
- Promote booth exhibitions related to financial planning topics
- Provide active listening and objective feedback to students in need of coaching

Clearwater Resources LLC, Lubbock, TX 2017 - present
Administrative Assistant

- Assist CPA and HR Manager with creating, maintaining, and accurately entering information into QuickBooks and Dropbox
- Set up paper and electronic filing systems, record information, update paperwork, and maintain documents for the security of federal regulations
- Capable of successfully managing multiple tasks and meeting deadlines accordingly

Volunteer Income Tax Assistance (VITA), Lubbock, TX 2016 - 2017
Tax Preparer

- Patiently and attentively assist taxpayers with free tax return preparations
- Conduct interviews to make sure taxpayers' information were entered accurately
- Analyze tax returns eligible for the earn income credit or educational credits using TaxSlayer Pro

Honors and Activities

- Personal Financial Planning Association at Texas Tech University - Member 2016
- Red to Black Peer Financial Coach at Texas Tech University - Member 2016
- Financial Planning Association - Member 2016
- Financial Investment Organization at Angelo State University - Member 2016
- Who's Who Among Students in American Universities & College - Recipient 2015
- Dean's List - Recipient eight consecutive semesters 2012 - 2016

Skills

- Volunteer Income Tax Assistance Certified
- Bilingual in English and Spanish
- Knowledgeable in Morningstar Office, MoneyGuidePro, eMoney emX, Money Tree, Redtail Technology, Salesforce, Planner CS, and Microsoft Office Suite

References available upon request