

JAMES PALMER

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Education

Texas Tech University

- Bachelor of Science in Personal Financial Planning, *Expected December 2018*
- GPA: 3.50
- Course Work: *Risk Management, Asset Management, Retirement, Estate Planning, Client Communication*

South Plains College

- Associate of Science, *Graduated 2015*

Experience

Intern

May 2017 – July 2017

True North Advisors

Dallas, TX

- Research - Cash Flow Management Software
 - Data Entry and Clerical - Tamarac University, Advisor CRM, Schwab Advisor Center
 - Development of Client Questionnaire for Financial Planners
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Office Manager

June 2015 - May 2017

The Select Group at Keller Williams Realty

Lubbock, TX

- Administered client relations and processes through delegation and planning
 - Collaborated and consulted with leadership and team members
 - Tracked and forecasted company financials - QuickBooks Online
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Pest Control Technician

January 2013 - May 2014

Gafford Pest Control

Lubbock, TX

- Assessed and inspected residential and commercial property for infestations
 - Monitored and maintained property for residential and commercial clients
 - Determined short and long-term solutions for clients
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Organizations

Red to Black

Treasurer

- Peer to Peer Financial Coach, Facilitate financial literacy presentations on campus, Counseling sessions

Key Outreach Program

SORC Representative

- Founding member of organization, Financial Literacy Presentations

Toastmasters International

Treasurer

- Increased membership, Managed Membership Dues
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Technology and Skills

Portuguese, Fluent

Two-year church mission in Northern Brazil, LDS Church

Tamarac University

Advisor CRM, Advisor View

Money Tree Software

Researched and Trained True North Advisors

QuickBooks online

Payroll, Reconciling, Financial Reporting

RightCapital

Researched and Used 30-day Trial for True North Advisors

Schwab Advisor Center

Beneficiaries, RMD, Cashflow

MoneyGuidePro

Comprehensive Financial Plan, Case Study