

# BANNER REID STEELE

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## **EDUCATION**

### **Texas Tech University, College of Human Sciences**

*Bachelor of Science, Nutritional Sciences*

- GPA: 3.66

*Master of Science, Personal Financial Planning*

- GPA: 4.0

- Career goals: Complete the master's program in Personal Financial Planning from Texas Tech and soon thereafter sit for the CFP exam to reach my goal of becoming a financial planner

Lubbock, TX

Graduation: May 2018

Expected Graduation: May 2020

## **INTERNSHIP/WORK EXPERIENCE**

### **FJY Financial**

*Summer Associate*

- Observed, took notes, and participated in conversations during client meetings
- Navigated different financial planning software and technologies such as Junxure, MoneyGuidePro, Worldox, and Tamarac
- Completed various projects over the course of the summer that exposed me to the scope of financial planning including general planning, tax, investments, retirement, operations, business, and compliance

Reston, VA

May 2019 – August 2019

### **First State Bank**

*Executive Assistant to President, CEO, and Chairman of the Board, Tom Turner*

- Shadowed Mr. Turner in his day-to-day activities and obligations
- Reviewed financial statements of the bank and portfolios of customers
- Attended board meetings and private meetings with customers led by Mr. Turner

Abernathy, TX

October 2018 – May 2019

### **H.G. Thrash Clothier**

*Sales Associate*

- Assisted owner on daily basis in all tasks associated with ensuring successful operation of store
- Provided excellent customer service to all customers to increase customer satisfaction and retail sales
- Catered to and communicated with high-end clientele

Lubbock, TX

July 2016 – September 2018

## **ACTIVITIES AND HONORS**

Teaching Assistant for the Chancellor Emeritus

Fall 2019

Red 2 Black Member

Spring 2019 – Present

Personal Financial Planning Ambassador

Fall 2018 – Present

President's Select

Spring 2015 – Spring 2018

Honors College

Fall 2014 – Spring 2018

Presidential Scholar

Fall 2014 – Spring 2018

College of Human Sciences Scholar

Fall 2014 – Spring 2018

Homecoming Nominee, President's Select

Fall 2017

Phi Delta Theta, Texas Epsilon Chapter

Fall 2014 Pledge Class