

BRANDON BERNING

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Objective

An entry level position in Financial Planning starting May 2020

Education

University of Minnesota Duluth (UMD)

Bachelor of Business Administration, May 2020

Major: **Finance, Financial Planning**, GPA: **3.5/4.0**

Dean's List for Academic Excellence: Fall 2017, Spring 2018, Fall 2018

Related Coursework/Projects:

Investment Fundamentals:

Wall Street Survivor Project: With the skills learned in class, I managed a portfolio with the value of \$500,000 in a simulation game that represents today's actual market.

Managerial Finance, Corporate Finance, Risk Management and Insurance

Financial Planning/Leadership Experience

Student Director, Financial Planning Program, Labovitz School of Business and Economics,
Duluth, MN May 2019 – Present

- Promote the major to underclassmen students.
- Schedule industry professionals to appear weekly to meet with the club
- Mentor students on class loads and course requirements.
- Represent the University at yearly TD Ameritrade advisor conference

Advisor Center Intern, Ameriprise Financial, Minneapolis, MN June 2019 – August 2019

- Studied for SIE and Series 7 Top-Off Exams; **passed the SIE**
- Responsible for outbound dialing of our large client base, in order to engage clients with the firm and build a fiduciary planning relationship
- Participated in various personal business development workshops and training courses

Financial Peer Mentor, UMD, Duluth, MN August 2019 – Present

- Meet with a student mentee once a week to educate on various financial topics
- Created a unique spending plan tailored to meet my mentees short-term financial goals

Business Tutor, UMD Tutoring Center, Duluth, MN January 2018 – Present

- Tutor for the classes of Applied Statistics, Principles of Financial Accounting, and Principles of Managerial Accounting for 4+ hours each week
- Demonstrate effective problem-solving skills with a wide variety of students

Completed Heart of a Leader Workshop Training, UMD, Duluth, MN February 2018

Additional Experience

Customer Service Representative, University Liquor, Duluth, MN May 2018 – Present

Host, Canal Park Brewing Company, Duluth, MN May 2018 – October 2018

Activities

Clubs

- Financial Planning Club October 2017 – Present
- Finance Club October 2017 – Present

Volunteer Work

- Salvation Army bell ringing, Duluth, MN, 20 hours November 2017 – Present
- Damiano Center, Duluth, MN, 10 hours January 2018 - Present
- Feed My Starving Children, Coon Rapids, MN, 16 hours January 2014 – Present

Sports

- Intramural Hockey and Softball September 2016 – Present