

EMILY K. BRINEY

EDUCATION

Iowa State University

Bachelor of Science, Financial Counseling and Planning
Educational Requirement in progress for CFP® certification
Minor in Event Management

Ames, Iowa

May 2020
GPA: 3.66/4.00

EXPERIENCE

Keeling Wealth Advisors A private wealth advisory practice of Ameriprise Financial Services, Inc.
Client Relationship Manager Intern

Johnston, Iowa
January 2019 – Present

- Formulated portfolio analysis for 15 client cases each day using multiple tools provided by Ameriprise Financial
- Observed client meetings of four different senior financial advisors while taking detailed notes, and interacting with clients
- Communicated appropriately with team members about work tracking progress via meetings, emails and Skype
- Planned one client appreciation event for 120 clients and advisors utilizing catering and venue services
- Acquired 900 hours and counting for CFP® certification requirements

Iowa State University

Peer Financial Educator

Ames, Iowa

August 2018 – November 2018

- Motivated 700 freshman students to finish Cyclone Cash Course with weekly informative emails
- Presented a two-hour interactive workshop informing 30 students about financial literacy
- Recruited a student audience to participate in financial literacy booths on campus

Montross Pharmacy

Pharmacy Technician in training

Winterset, Iowa

August 2016 – August 2017

- Assisted customers through deliveries, phone calls, and in store interactions
- Filled, recorded, and organized 200 prescriptions daily using POS system Rx30
- Helped customers in a friendly and professional way to understand their specific needs and routines
- Communicated effectively with manager and staff

LEADERSHIP AND CAMPUS INVOLVEMENT

Financial Planning Association Ames Student Chapter, Active Member

- Treasurer
- Event Manager

January 2018 - December 2018

January 2019 - December 2019

Kappa Delta Sorority, Active Member

- Sergeant In Arms

August 2017 - Present

January 2018 - May 2018

DEVELOPING SKILLS

- Potential candidate for the Certified Financial Planner (CFP®) certification
- Preparing for the Securities Industry Essentials Exam (SIE®) & Iowa Life and Health Insurance Exam
- Proficient knowledge in:
 - Money Guide Pro planning software
 - Sales Force Client Relationship Manager system