
Zachary H Godfrey

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Skills

High Work Ethic, Leadership, Organization, Peer Tutoring, Teamwork, Time Management, Customer Service, Communication

Education

- **University of Wisconsin-Madison** Madison, WI
Bachelor of Science (B.S.) -- Personal Finance: Financial Planning, Social Welfare *Sep '16 – May '20*
Intended Certificates- Business, Entrepreneurship
 - Cumulative GPA- 3.5

Relevant Coursework: Advanced Consumer Science, Building Financial Assets and Capability for Vulnerable Families, Employee Benefits Management, Entrepreneurial Management, Estate Planning, Family Economics, Family Financial Counseling, Leadership in the Global Economy, Principles of Managerial and Financial Accounting, Principles of Risk Management, Tax Planning and Concepts

Experience

- **CUNA Mutual Group** Madison, WI
Student Ambassador *Aug '19 – Dec '19*
 - Act as a liaison between CUNA Mutual Group and University of Wisconsin-Madison professors and students
 - Represent CUNA Mutual Group at career fairs and other organized UW-Madison events
 - Host group or individualized information sessions, to recruit for CUNA Mutual Group

Retirement Product Intern *Jun '19 – Aug '19*

 - Analyzed data of over 44,000 participant plans to determine trends with individual's that are approaching retirement
 - Won 3rd place in the 2019 Intern Herring Cup by developing an idea that connects CMFG to more consumers digitally, while helping members achieve financial security
 - Researched trends in the HSA Landscape, to determine the feasibility of a product offering
- **School of Human Ecology: Financial Life Skills Program** Madison, WI
Lead Peer Educator *Aug '18 – Present*
 - Educate students on real-life financial topics, including Retirement Savings, Investments, Budgeting, Taxes, Debt Management and Employer Sponsored Benefits
 - Facilitate group discussions and ensure the active engagement of my peers, to increase their financial literacy so to be prepared for life after college
 - Grade over 100 students' homework, in-class activities and participation
 - Work with Program Directors to advertise our course offerings, update presentations, and create resource guides
- **Kwik Trip, Inc.** Verona, WI
Guest Service Co-worker *Jun '17 – Jun '19*
 - Provided high-energy and friendly customer service, consistently going out of my way to help guests
 - Showed strong work ethic around the store, completing tasks timely
 - Accelerated customer help-time through precise monetary exchanges
- **AMC Theaters/New Vision Theaters** Fitchburg, WI
Film Crew Member *Nov '15 – Jul '18*
 - Displayed initiative by utilizing my organizational skills to improve functionality
 - Demonstrated how proactive thinking can allow for the enhanced dealing of future problems
 - Oversaw the training of new employees and furthered their Customer Service development

Leadership & Involvement

- **BadgerSense**
 - Meet one-on-one with students, to answer questions about various financial topics, therefore increasing their financial decision-making confidence
- **FOCUS (Financial Occupations Club for University Students)**
 - Serving as Communications Chair for the 2019-2020 Academic Year, responsible for all communication strategies
 - Immerse myself in the wonderful world of personal finance through various club trips and speaker events
- **St. Vincent De Paul**
 - Attracted the interest of potential clients and prospective partners concerning a new program offering low-interest loans to deal with vulnerable families' existing debt obligations by designing marketing materials to be used across Madison
- **VITA (Volunteer Income Tax Assistance) Program**
 - Volunteer with UW Credit Union as a Certified IRS Tax Preparer, providing free income tax preparation to taxpayers (low-income families and individuals) with incomes up to \$53,000
 - Improve client understanding of finances and discovered deductions leading to refunds of up to \$5,000
- **WisCARES Veterinary Clinic**
 - Assisted with various tasks around the clinic, helping clients and vets when needed
 - Learned more about the financial struggles of low-income families through this immersive community learning experience

Certifications

- Securities Industry Exam (SIE)
- Certified IRS Tax Preparer