

# Colby R McIntire

608 2<sup>nd</sup> St. NW • Waseca, Minnesota, 56093 • (712) 301-1668 • colbyrm96@gmail.com

## Education

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**Minnesota State University – Mankato, MN – AACSB Accredited**

**Graduation - May, 2019**

**Major: Financial Planning**

**GPA: 3.15**

### Professional Certifications:

- Series 7 & 66
- Minnesota Insurance License (Life/Accident/Health)
- CFP Coursework completed

### Related Coursework:

- Risk Management and Insurance
- Financial Planning Capstone Course
- Individual / Corporate Income Tax
- Corporate Finance
- Estate / Retirement Planning
- Strategic Financial Management

## Internship and Work Experience

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**Associate Wealth Advisor – iWealth – Waseca, MN**

**June 16, 2019 - Present**

- Assist in Meeting and Plan Preparation
- Participate in advisor client meetings through note taking and presenting areas of the meeting
- Work with eMoney, Riskalyze, and Redtail in the planning process for clients
- Interpret clients' financial position and present suggestions to their financial plan
- Setting up processes to clarify and enhance client data analysis

**Beef Farm Manager – Triple G Farms – Rock Rapids, IA**

**June, 2012 - August, 2016**

- Prioritizing needed farm tasks create a more efficient task flow
- Book keeping (Vaccines & Births) resulting in a decline of premature deaths
- Built and repaired fences freeing out 10+ hours per week otherwise rounding up free cattle

**Menards Load Builder / Outside Yard Help**

**March, 2017 – November 2018**

- Building Orders through locating necessary products via SKU
- Finalizing Order in books
- Working Independently with little guidance

## Additional Leadership & Volunteer Experience

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- **College Wrestler – Minnesota State University, Mankato** – Scholarship Athlete for MSU Wrestling team **2015-2018**
- **Member – Financial Planning Club** **2018 - Present**
  - **Public Relations Officer**
- **FPA of Minnesota Member** **2019-Present**
  - **Pro Bono Board Member**
- **Volunteer – Kiwanis Lights Set-Up** – Helped in the hanging of lights. **2015, 2016**

## Awards and Recognition

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- **Dean's List Member** – Excelling in the classroom. **2016-2018**

## Additional Professional and IT Skills

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- Efficient in Microsoft Office including Excel, Word, PowerPoint, Outlook
- Financial Planning Software familiarity (Redtail, eMoney, Riskalyze, MoneyguidePro)

## Continuing Education

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- Preparing to take CFP Exam in July 2020
- The Happiness Advantage
- FPA Symposium
- Financial Advisor Success (Podcast)