

Justin Roach

720 W Lake St #213, Minneapolis, MN 55408 | roach.justin@hotmail.com | (575) 317 0165

EDUCATION

Texas Tech University | Personal Financial Planning
Bachelor of Science, Cum Laude

University Organizations:

Financial Planning Academy | *Student Advisor*

Advised a team of four high school students through a week-long financial planning competition

KEY (Knowledge Empowering You) Outreach | *Member*

Delivered financial education presentations in traditionally underserved communities of Lubbock

Financial Planning Department | *Student Ambassador*

Served as event volunteer, hosted for professionals during on-campus visits, and assisted with student recruiting efforts

Personal Financial Planning Association | *Member*

Attended professional development meetings twice monthly

Awards & Certifications

2019 FPA Financial Planning Challenge Winner | 3rd Place

FINRA Securities Industry Essentials Exam | Passed November 2019

TTU President's List | Fall 2017 – Summer 2019

TTU Dean's List | Fall 2019

** CFP Certification Exam Eligible **

EXPERIENCE

White Oaks Wealth Advisors

June – August 2019

Financial Planning Intern

- Assisted with preparation, presentation and follow-up for 10 comprehensive client meetings
- Developed an informational guide to assist clients connecting to virtual meetings through RingCentral
- Monitored and updated client information using Salesforce, Money Guide Pro and other software
- Assisted in development of financial education material for children of clients

Red to Black Peer Financial Coaching

December 2018 – May 2019

Student Assistant

- Delivered financial education presentations on budgeting, credit, and smart goals to classes with up to 50 students
- Organized two on-campus financial literacy events: America Saves Week & Financial Education Week
- Trained incoming coaches on presentation skills and other organization duties
- Maintained records pertaining to presentation and coaching session feedback for 28 coaches

Volunteer Experience

VITA (Volunteer Income Tax Assistance)

Lubbock, TX

Ronald McDonald House

Lubbock, TX

SOFT SKILLS

- Attention to detail
- Problem solving
- Teamwork & communication
- Adaptability / flexibility
- Time management
- Leadership

FINANCIAL PLANNING SOFTWARE COMPETENCIES

- MoneyGuide Pro Intermediate
- Morningstar Advisor Workstation Intermediate
- RightCapital Beginner
- eMoney Beginner
- Schwab Advisor Center Beginner
- Salesforce Beginner