Jacob T Teske

Mankato, Minnesota

952-686-8161

Jacob.Teske@mnsu.edu

Objective

I am currently a financial planning student at MNSU with multiple years of experience in the insurance and financial planning industry. I am looking to join a team at a reputable financial planning firm.

Work Experience

|  |  |
| --- | --- |
| **Wealth Centers of America,** Mankato, Minnesota  *Financial planning / Marketing Intern* | 05/2019 – Current |

* Called to review current client’s policies and recommend other options
* Worked on a team to redesign the company website
* Go out and find new clients for insurance and security products

|  |  |
| --- | --- |
| **Integrated Business Experience**, Mankato, Minnesota  *VP of finance of a student run company* | 08/2018 – 12/2018 |

* Prepared weekly income statements and balance sheets
* Handled all cash, and oversaw Venmo and Square transactions
* Delegated tasks to a 5-person team

|  |  |
| --- | --- |
| **AFLAC**, Mankato, Minnesota  *Insurance Agent* | 12/2017 – 12/2018 |

* Found potential clients by cold calling and going to local businesses
* Presented options that suited client’s needs
* Became an expert on employee benefit products

Education

|  |  |
| --- | --- |
| **Minnesota State University Mankato**  Bachelor’s degree in Financial planning, Minor in Entrepreneurship  Activities: Treasurer of the Enactus club, Member of Financial Planning club | 2020 |

Skills

* PowerPoint, Excel, and Word
* Knowledge of insurance products
* Relationship building
* Knowledge of Security products
* Excellent customer service.
* Time management
* Problem-solving skills
* Retirement and Estate planning

**Certifications**

**Life, Health, and Accident Insurance**

**Medi-share representative certification**