Jacob T Teske

Mankato, Minnesota

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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

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| **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

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| **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

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| **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

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| **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**