**Aaron J Wurm**

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**Objective**

I am seeking a client-facing or advisor-supporting role in financial services, where my strengths and future CFP® designation will be utilized. I believe that a client deserves a holistic planning experience and believe my strong communication and analytical skills will allow me to excel at either. I would like to add value to a practice through enabling advisors to spend more of their time on their core objectives. It is important that a career provides opportunities to increase my industry knowledge and supports growth within.

**Education**

**Minnesota State University – Mankato, MN – AACSB Accredited Expected Graduation – May 2020**

**Bachelor of Science in Finance GPA:** 3.77

**Emphasis:**Financial Planning and Insurance & Investment Analysis

**Highlighted Coursework**

* Personal Financial Planning – Spring 2020
* Maverick Fund (Student Investment Fund) – Fall 2019

**Awards and Certification**

* **CFP® Certification** – Exam **Fall** **2020**
* **SIE Exam –** Passed **July 2019**
* **Dean’s List** – 3.5+ GPA during a semester **Fall 2016 – Spring 2019**

**Work Experience**

**Practice Intern – Wealth Management Solutions | Ameriprise – Mankato & Austin, MN August 2019 – Current**

* Created Salesforce Reports to segment clients for a more direct approach to our service model.
* Helped rebalance the marketing budget by using more efficient methods like Facebook and engaging referral events.
* Recorded client meeting notes and offered suggestions for next steps on client cases to the lead advisor.

**Financial Planning Intern – Ameriprise Financial – Minneapolis, MN May 2019 – August 2019**

* Learned about the Ameriprise Financial tool suit and associated advisor technology support systems.
* Researched leading financial planning technology; presented findings and next steps to executive leaders.
* Created a scalable HTML email campaign, regarding advisor seminars & events, to increase marketing productivity.
* Partnered with the financial advice sales consulting team on financial planning case design.

**Additional Leadership Experience**

**Teacher’s Assistant (Personal Financial Management) – Mankato, MN February 2019 – Current**

* Created 16 presentation decks from personal financial materials to reinforce class objectives.
* Administered student portal systems for posting lesson plans and grading of assignments.
* Communicated directly with the professor about in-class problems and solved them in a timely manner.

**Vice President of the Mankato Financial Planning Club – Mankato, MN May 2018 – Current**

* Helped lead meetings and discuss financial planning topics while encouraging student interaction and engagement.
* Worked on building an educational club framework to make students more polished in the industry after graduating.
* Invited 12 financial leaders to speak to our club and highlighted important skills for graduates in the industry.
* Directed a trip to the FPA of Minnesota’s Symposium to increase our Finance industry acumen as students and a club.

**President & Treasurer of the Mankato Men’s Club Lacrosse Team – Mankato, MN April 2017 – September 2018**

* Contacted school and league staff on administrative matters such as scheduling practices and games.
* Collected player dues and managed payments; controlled the team budget and ordered equipment to brand specifications.
* Organized team excursions to Illinois and Nebraska which included the hotels, itinerary, transportation, and meals.