

Brooke Smith

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EDUCATION

Bachelors of Arts in Spanish and International Business

January 2022 - December 2025

Clemson University, Clemson, South Carolina

Bachelors of Science in Industrial Engineering

August 2021 - May 2025

Clemson University, Clemson, South Carolina

International Management Summer Program

July 2023

IESEG School of Management, Paris, France

EXPERIENCE

Associate Financial Planner

June 2024 - Present

Upstate Legacy Planning Group, Greenville, South Carolina

- Collaborate with clients and advisors to develop tailored financial plans.
- Process applications and service requests, ensuring timely and accurate responses.

Client Service Specialist

June 2020 - Present

Northwestern Mutual, Greenville, South Carolina

- Schedule and coordinate meetings between Financial Representatives and clients.
- Streamlined data management and client relations, improving service efficiency.

Summer Intern

May 2024 - August 2024

REI Junkies, Greenville, South Carolina

- Utilized Canva to create effective Spanish versions of marketing materials.
- Assisted spanish-speaking clients with payments.

Director of Academics

January 2023 - December 2023

Pi Beta Phi, SC Beta Chapter, Clemson University

- Developed personalized academic improvement plans for students on probation.
- Facilitated bi-weekly meetings, boosting student retention and academic performance.

LICENSES AND CERTIFICATIONS

Uniform Securities Agent License (Series 63)

Anticipated March 2025

The Financial Industry Regulatory Authority (FINRA)

General Securities Registered Representative License (Series 7)

Anticipated March 2025

The Financial Industry Regulatory Authority (FINRA)

Life and Health Insurance License

April 2024

South Carolina Department of Insurance

SKILLS

Languages

- *Spanish* - Intermediate

Technical Skills

- Excel VBA
- Financial Planning & Analysis
- Operations & Process Optimization

Soft Skills

- Leadership & Communication
- Problem-Solving
- Time Management
- Analytical Thinking