Caleb Winslow

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My Key Qualifications

- **46 financial plan updates** in 12 months at CAPTRUST, maintaining client data and drafting retirement, cash flow, and insurance scenarios in eMoney Advisor under senior advisor guidance.
- Built a full **retirement income plan in eMoney Advisor** for a pre-retiree capstone case, modeling Social Security timing and IRA withdrawals to lift projected plan success from 71% to 84%.
- Processes account opening, transfers, and beneficiary changes across **Schwab Advisor Center**, cutting average service-request turnaround from 4 business days to 2 with a custodial forms tracking spreadsheet.
- Prepared materials for **58 client meetings**, delivering every review packet by the prior business day while organizing summaries, beneficiary records, and action items in Salesforce.
- **SIE certified** through FINRA (2025), meeting the posting's licensing requirement within the hiring window.
- Bachelor of Science in **Finance** (University of South Carolina, 2025) with coursework in retirement and estate planning, risk management and insurance, and personal financial planning.

Experience

Associate Financial Advisor — **CAPTRUST**, independent registered investment advisor and retirement plan consulting firm

May 2025 – Present · 1 yr 6 mos

- Prepare client review materials, gather financial documents, and update household records ahead of advisor meetings, delivering packets for 58 client meetings with 100% on-time delivery by the prior business day
- Built and maintained financial plans in eMoney Advisor under senior advisor guidance, completing 46 plan updates across retirement, cash flow, and insurance analyses in 12 months
- Cut average turnaround on client service requests from 4 business days to 2 by creating an Excel tracking sheet for custodial forms, follow-ups, and pending signatures across Schwab Advisor Center
- Process account opening, transfers, beneficiary changes, and service requests on custodial platforms, documenting every interaction in Salesforce

Education

- **University of South Carolina** — Bachelor of Science in Finance · 2021 – 2025 · Relevant coursework: Investments, Retirement and Estate Planning, Risk Management and Insurance, Financial Statement Analysis, Personal Financial Planning

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Projects

- **Retirement Income Plan Capstone**
  Built a retirement income plan in eMoney Advisor for a pre-retiree household case, modeling Social Security timing, IRA withdrawals, and insurance needs. Improved projected plan success from 71% to 84%.
  Tech: eMoney Advisor, Microsoft Excel, Microsoft PowerPoint
- **Small Business Cash Flow Analysis**
  Analyzed seasonal cash flow and budgeting patterns for a local service business client through a senior finance course project. Identified 3 monthly expense changes that improved projected year-end cash by $12,400.
  Tech: Microsoft Excel, Microsoft PowerPoint, Financial Statement Analysis

Skills

- **Financial Planning:** Retirement Planning, Asset Allocation, Cash Flow Analysis
- **Advisor Technology:** eMoney Advisor, Salesforce, Schwab Advisor Center
- **Client Service & Microsoft Office:** Client Service, Microsoft Excel, Microsoft PowerPoint, Microsoft Outlook

Certifications

- **Securities Industry Essentials (SIE)** – FINRA (2025)

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