

# BRIAN L PHILLIPS

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## EDUCATION

### ILLINOIS STATE UNIVERSITY

Bachelor of Science in Finance and Insurance

Normal, IL

May 2021

Cumulative GPA: 3.53/4.0

Dean's List: Fall 2017

## WORK EXPERIENCE

### RMB CAPITAL WEALTH MANAGEMENT

Rotational Intern

Chicago, IL

June 2019 – August 2019

- Rotated through Asset Management, Wealth Management, and Business Operation departments
- Completed research projects including a stock pitch, 529 asset allocation plan, and Money Guide Pro Presentation
- Actively observed wealth management client meetings
- Participated in the "Rock the Boat" philanthropy event along with community service for the Chicago Parks and recreation

### MORTON PRIVATE WEALTH STRATEGIES

Financial Advisor Intern

Geneva, IL

May 2018 – August 2018

- Recruited new clients and then actively assisted in strategy discussions and investment options
- Studied the American College lectures and seminars of Financial Planning and current news in politics and finance
- Participated and actively listened in company meetings and headquarter callings and updates
- Volunteered at philanthropic events for local charities and non-profit organizations

### PE REAL ESTATE LLC.

Co-Founder

Normal, IL

September 2019 - Current

- Research potential real estate investments through an analysis of property characteristics
- Collaborate and discuss with clients on house showings
- Utilize operational systems to maximize organization and efficiency for property analysis

### CHASER'S

Manager

Bloomington-Normal, IL

August 2018- November 2019

- Coordinated and set work schedules for 25 employees
- Responsible for assigning nightly roles and distribution of compensation for all employees each night

## LEADERSHIP AND ACTIVITIES

### HACKER HOUSE SCHOLARSHIP

Social Scape Founder

Bloomington-Normal, IL

August 2019 – May 2020

- Created and operated a business with three other co-founders and plan to begin official business in August of 2019
- Operated our business through the "Hacker House" created by the CEO of PackBack, business partners with Mark Cuban
- Reported directly to CEO of PackBack concerning amount of sales, profit, potential clients, and sales strategies

### ALPHA KAPPA PSI PROFESSIONAL BUSINESS FRATERNITY

Vice President of Marketing

Bloomington-Normal, IL

September 2017 – May 2019

- Executed events with precision and delegated tasks to members of the committee
- Promoted and Marketed all events associated with Alpha Kappa Psi on social media platforms

### INVESTMENT FUND

Active Member

Bloomington-Normal, IL

May 2019 – Current

- Meet weekly to buy, sell, or hold various securities based on current market condition
- Take site visits to reputable companies in the Chicagoland area

### FINANCIAL PLANNING ASSOCIATION (FPA)

Active Member

Bloomington-Normal, IL

December 2017 - Current

- Attend seminars every other week to connect highly reputable professionals
- Network with various Financial Planners and Advisors to learn about their experience within the industry

### ILLINOIS STATE STUDENTS IN FINANCE (ISSF)

Active Member

Bloomington-Normal, IL

December 2017 - Current

- Contact local and international companies to host seminars about various jobs, skills, and duties
- Conduct trips to shadow multiple variations of financial jobs in Illinois

## OTHER INVOLVEMENT & SKILLS

- Money Guide Pro • Black Diamond • Wealth Scape • Pi Kappa Phi – Social Fraternity • St. Jude's Children's Hospital • Adopt-A Street • Habitat for Humanity • KTB Financial • Midwest Food Bank • Feed My Starving Children • Team Rubicon