

# Calvin Treichler

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## EDUCATION

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### UNIVERSITY OF MINNESOTA, Twin Cities

Minneapolis, MN

Curtis L. Carlson School of Management

May 2018

Bachelor of Science in Business

GPA: 3.38

Majors: Finance; Public & Nonprofit Management. Minor: Entrepreneurial Management

## WORK EXPERIENCE

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### Fure Financial Corporation

Bloomington, MN

*Client Service Representative*

June 2018 - Present

- Assist Wealth Advisors in client meetings, taking notes, and learn from conversations
- Coordinate Employer Retirement Plan review process with Investment Manager and discuss recommendations
- Implement Salesforce for a 11-person company and acted as continued Salesforce administrator

### Wacek Financial Planning

Minneapolis, MN

*Intern*

May 2017 – August 2017

- Utilized analytical skills by performing retirement, debt, and other analyses and assisting in the construction of financial plans for roughly 15 new and existing clients.
- Developed knowledge of financial planning by observing roughly 40 hours of financial planning meetings facilitated by a CFP®.
- Applied education received throughout internship to independently create and present a financial plan for a new client, and received support and feedback from a CFP®.
- Built automated systems in Microsoft Excel to drastically increase efficiency of investment and debt analysis for clients.
- Learned and displayed self-motivation by working from home 2-3 days out of each week.

## ACTIVITIES

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### CRU (Christian Campus Ministry)

Minneapolis, MN

*Treasurer*

March 2016 – August 2017

- Created organized, detailed budgets by recording all student group spending and constructing a new system for reimbursements.
- Demonstrated communication skills by establishing meeting times with 2-3 students, planned activities and agenda for weekly finance team meeting.
- Selected and trained new Treasurer by explaining responsibilities of the position and provided teaching on how to create budget and record spending.

*Student Leader*

September 2015 - Present

- Display leadership by planning and leading a weekly Bible study for 5-6 junior students, encouraging and challenging them towards growth and maturity.
- Mentor a junior student by meeting with individual every week to listen, teach, and encourage spiritual growth in a personalized manner.