**Raymond Oliver Ingram**

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**Education**

**University of New Hampshire**, Durham, NH Expected May 2021

*Peter T. Paul College pf Business and Economics*

Bachelor of Science in Business Administration with an option in Finance; GPA: 3.15

**Senior Capstone Project: ‘Insurance: Role in Financial Planning’** (Fall 2020) - Worked with team of four to investigate and present how insurance policies can assist individual investors with their long term financial security; used Excel to analyze actual life, disability and home/auto insurance data.

**FINRA Securities Industry Essentials,** *Passed Examination* August 2020

**Bloomberg Market Concepts**, *Certificate of Completion* February 2020

**Envestnet on Campus**, *Certificate of Completion* November 2019

Completed self-paced, online course covering aspects of wealth management & financial advising

**Skills**

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| --- | --- | --- |
| * Financial Planning & Advising
 | * Investment Strategy Analysis
 | * Client Service Focus
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| * Equity & Fixed Income Research
 | * Annuities & Related Contracts
 | * Bloomberg Terminal
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**Experience**

**ICON Information Consultants for John Hancock**, Portsmouth, NH October 2019 – Present

*Annuity Correspondence Intern*

* Respond to fixed and variable annuities department requests
* Send contracts and documents to customers in a timely manner using proper business correspondence
* Work 12-16 hours each week while balancing full academic course load

**Flapgship Investment Group**, Somersworth, NH June 2019 – August 2019

*Intern*

* Assembled and consolidated annual client review information including account, insurance, and asset holdings for future client consultative meetings
* Received exposure to various financial and insurance institutions’ account statements and reporting
* Prepared introduction package for new clients prior to their first financial planner meeting
* Utilized Redtail CRM software to access and assess client data
* Investigated a new investment strategy and reported to management on the pros/cons to management

**Market Basket**,Dover, NH June 2016 – August 2017

*Produce Associate*

* Developed both customer service and inventory management skills
* Contributed to management’s pricing strategy and supply chain decisions

**Campus Activities & Volunteerism**

**Financial Partners Mentorship Program**, *Student Mentee* May 2020 – Present

**Red Cross Blood Drive**, *Volunteer*  November 2019

**Sigma Alpha Epsilon Fraternity**, *Fundraising Committee Member* September 2019 – Present

**UNH Intramural Athletics**, *Soccer, Basketball & Broomball Player* September 2018 – Present