

Brandon J. Klump

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EDUCATION

Michigan State University, Broad College of Business, East Lansing, MI

May 2025

Bachelor of Arts, Finance.

- Minor in Financial Planning and Wealth Management (CFP registered program)
- Major GPA: 4.00/4.00; Cumulative GPA: 4.00/4.00. Dean's List: 6 Semesters.

Amplified Planning, Richardson, Texas

Jun. 2023 – Aug. 2023

The Externship. - This virtual, asynchronous 8-week program took approximately 20 hours per week

- Utilized hands-on experience in the main areas of financial planning: cash flow, investing, retirement, etc.
- Watched real client meetings and developed client deliverables on eMoney Advisor.
- Gained Experience using Asset-Map, Redtail CRM, MorningStar Advisor Workstation, and Income Lab. Learned planning and best practices from 50+ industry experts. Earned 180 experience hours toward CFP® Board.

PROFESSIONAL EXPERIENCE

Sparty's Market 1855, East Lansing, MI

Aug. 2023 – Present

Student Supervisor

- Supervising students and managing retail operations by delegating tasks, optimizing workflow efficiency, training new hires, and actively working in various roles within the fast-paced market environment.

Sigma Investment Counselors, Northville, MI

May. 2024 – August 2024

Intern - Paraplanner and Investment Analyst

- Suggested rebalancing trades using Tamarac for one of Sigma's advisors, taking client-specific tax needs and unique investment mindsets into account. Participated in client meetings, where I took notes and prepared agendas. Set up MoneyGuidePro profiles for prospects and new clients.
- Acquired knowledge of client-specific tax and estate situations, like IRA distributions and their effects on IRMA premiums, by utilizing Holistiplan tax software to answer client questions and ultimately composed emails addressing related questions.
- Conducted research on investments, economic trends, and geopolitical factors. Completed a stock analysis report on Palo Alto Networks using the Holt investment research tool. Enhanced Sigma's bond rebalancing process by creating a Macro Excel spreadsheet to improve the accuracy and efficiency of this process.

Clarity Window Cleaners, LLC, Canton, MI

May 2023 – August 2024

Owner

- Founded and grew a successful window cleaning business, generating over \$25,000 in revenue and servicing nearly 100 clients.
- Recruited, trained, and managed two other college students to do the cleaning, while overseeing marketing, budgeting, and client relations.
- Executed strategic advertising campaigns via referrals, Facebook Ads, and Nextdoor Ads, boosting brand visibility and client acquisition.

Enduser Technologies, LLC, Canton, MI

Dec. 2019 – April 2024

Lead Website Designer

- Assisted in over 20 client website design, redesign, development, and migration projects, successfully increased clients' online presence. Coordinated designs for websites using WordPress, WooCommerce, and Shopify.
- Studied and executed website creation practices, including user experience, performance, mobile friendliness, SEO, and maintenance. Communicated responsively with clients as their main point of contact.

ACTIVITIES, HONORS, & SKILLS

FinServ Foundation Fellowship Program, *Member*

Aug. 2024 – Present

MSU Wealth Management Association Podcast, *Director of Podcast*

July. 2024 – Present

CFA Society Detroit Annual Luncheon

Nov. 2023

Boy Scouts of America, *Eagle Scout*

Sep. 2014 – April 2021