

(720) 352-8065

JEREMY D. WILSON
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209 12TH ST GREELEY, CO 80631

OBJECTIVE Obtain a challenging position that is rewarding and benefits both my employer and my family.

EXPERIENCE **FIELD TECHNICIAN WATER SOLUTIONS**
BNN Water, May 2, 2017- Jan 11, 2019
370 Van Gordon St, Lakewood, CO 80228 (888) 712-6604
Monitor water disposal sites, ponds, and pumps for proper equipment function and safe conditions. Disassemble, clean and reassemble filter pods. Respond to frack operation needs by manual starting of pumps and hydrant connection/disconnect. Maintain clean and safe working environment. Collect meter totals for reporting. Routinely assist with projects to streamline functions and/or increase safety. Complete general assignments delegated to me.

WEALTH PLANNING RELATIONSHIP MANAGEMENT ASSOCIATE
First Western Trust Bank, Feb 22, 2016- Feb 28, 2017
3003 E. Harmony Rd. Suite 200 Fort Collins, CO 80521 (970) 229-4700
Assist in various aspects of creating comprehensive and complete financial plans. Deliver fiduciary standard service in support of estate, trust, financial, and investment planning for clients. Build and evaluate retirement cash flow projections using planning software. Identify needs and provide solutions using Life, Disability, P&C and L.T.C. Insurance thru summary building and analysis. Routinely create and update personal financial statements, cash flows, and financial spreadsheets. New client onboarding and management of existing client relationships by forming bonds founded in trust.

FINANCIAL SERVICES CONSULTANT
Public Service Credit Union, March 1, 2015- Feb 15, 2016
700 Whalers Way Fort Collins, CO 80525 (970) 416-5000
Help credit union members construct a financial house. Advised members on the correct use of and best fit for loans, mortgages, budgeting, saving and investing that the credit union offers. I benefited community members with banking locally through the credit union organization and informed of all the ways my organization could assist and benefit its members. I worked closely with our loan processing and underwriting departments to insure that the consumer is a best fit for the product offered. I also helped with the day to day functions of the branch.

FROM THE DESK OF

JEREMY WILSON

209 12TH ST GREELEY, CO 80631

EDUCATION COLORADO STATE UNIVERSITY
Fort Collins, CO — Bachelor of Science in Business
Administration with Personal Financial Planning Focus-Aug 23,
2011- May 21, 2013.

FRONT RANGE COMMUNITY COLLEGE
Fort Collins, CO — Associates Degree with a focus in
Business- Jan 23, 2005- May 21, 2009.

LICENCES Notary public and ordained minister. Previously held licenses
include: Series 6, 63 and Colorado State Life and Health.

INTERESTS Financial news from a variety of sources
Donate time to community projects and organizations: Senior
Partner with Partners Mentoring Youth Feb 2014-Present,
Project Homeless Connect 2012-2015, and random service
for Humane Societies, Colorado Pit Bull Rescue, and the SAVA
Center, Junior Achievement Class Tutor 2017.
Legacy Project Participant 2016.
Financial Planning Association Member.
Daily training and exercising of my dogs.
Hiking, camping, weight lifting, darts, billiards, and bowling.

GOALS Return to donating my time to nonprofits and
charitable organizations. Be recognized as a
community philanthropist, a good husband and father.
Position myself as indispensable to my employer with goal of
longevity.

REFERALLS Tony Pares, Leadership for Educational Equity. (303) 718-
3352. Denver, CO Susan
Rose, Whispering Pines Pet Resort. (303) 776-3907
Longmont, CO Brian Osborn, Osborn Enterprise. (303) 204-
0137. Firestone, CO
April Peterson, Warren Credit Union. (970) 286-3345. Ft
Collins, CO
Brooks Gorden, Mainline Restaurant. (970) 481-0243. Ft
Collins, CO Chase Walstad, BNN Energy. (303) 961-8122.
Longmont, CO

SKILLS Experienced in the use of personal finance software: Money
Guide Pro, Finametrica, Asset Allocation, and Planning
Station. Proficient in Excel and Word.

FROM THE DESK OF

JEREMY «LAST»

Familiar with CRM and Scada software.
Water and filter system assembly and maintenance.
High level of communication and socialization, both written
and verbal. Adept at
recognizing inefficiencies.
Practiced in building trust based relationships.