CHRISTINE C. DAMICO, CFP®, EA

880 West Campus Drive, Pamplin 2111 Blacksburg, VA 24060 ● (540) 231-7009 ● cdamico@vt.edu

EXPERIENCE

OLIO Financial Planning, Director of Human Capital & Financial Planner – Tysons Corner, VA, October 2017 - Present
- Deploy best practices to identify the appropriate strategies necessary to achieve clients' personal and financial goals through life planning techniques
- Lead advisory teams to create and maintain an outstanding client experience from the first contact with a prospective client to an on-going long-term client relationship
- Develop and manage the implementation of the OLIO® at Work platform so each team member can achieve key performance metrics and accomplish their own personal and financial goals

Virginia Polytechnic Institute & State University, Adjunct Professor – Blacksburg, VA, August 2017 – Present
- Teach *Financial Planning for Professionals* (FIN 3124) to juniors and seniors to expose them to the financial needs of individuals, households, and small business owners
- Prepare students for the professional world through the usage of in-class mock client meetings, and outside-of-class assignments requiring students to write client letters and present recommendations over the phone and in-person to fake clients
- Critique resumes and cover letters and provide assistance with negotiation strategies to help students obtain internships and full-time positions in the financial planning profession

Glassman Wealth Services, Client Advisor – Vienna, VA, December 2014 – June 2017
- Managed 70 client relationships for individuals and families with $2MM+ of investable assets
- Expanded firm's investment management focus to include comprehensive financial planning services
- Trained existing and new advisors on advanced tax and insurance planning techniques
- Initiated and organized quarterly meetings for firm's Advisory Team to gain exposure in complementary industries such as accounting, estate planning, non-profit organizations, insurance companies, and other financial niche markets
- Created and implemented firm's 10-week summer intern and 4-week winter extern programs

Cornerstone Wealth Advisors, Inc. Financial Planning Resident – Minneapolis, MN, June 2010 – June 2014
- Analyzed and developed financial planning recommendations, which incorporated cash flow management, asset protection, investment, retirement, estate, income tax, and education planning strategies
- Facilitated client review meetings to deliver financial planning recommendations, implementation strategies, and monitoring requirements
- Supervised and trained two other Financial Planning Residents on in-office operation procedures, client meeting preparation, and developing goal-oriented financial plans and recommendations
- Assisted in the implementation of the firm's compliance and other regulatory requirements
- Managed and maintained the firm's website to drive existing and prospective client engagement

ACTIVITIES

Financial Planning Association (FPA), Member, Fall 2008 - Present

National Capital Area, Board of Directors - Social Events, December 2016 – December 2017
- Organized a one-day charity golf tournament (raised $11,000+ in May 2017 to donate to The Foundation of Financial Planning and to provide scholarships to students to attend local FPA events)
- Organized six happy hour events throughout the year for networking and continuing education opportunities for DC, northern VA, and MD financial planners

National FPA Advocacy Day, Participant, June 2015 & June 2016
- Dialogued with federal policymakers on Capitol Hill to advocate for a fiduciary standard and the appropriate regulation of financial planners

Minnesota FPA Chapter, Financial Education Committee Member, August 2011 – June 2014
- Organized BestPrep's eMentors program in which FPA members volunteered to mentor high school students on financial literacy topics over the course of eight weeks

National Annual Experience Conference, Orlando, FL, October 2013
- Conference Speaker: "Ready. Set. Go! The Four-Year Launching of a Gen Y Financial Advisor"

National Annual Experience Conference, San Antonio, Texas, October 2012
- Conference Speaker: "Connecting Talent, Experience, Advisory Capacity and Profit: Creating a Multi-Year Financial Planning Residency"

FPA Residency Program, Attendee, Lake Arrowhead, CA, October 2011
- Completed a six-day intensive, client-centered training program utilizing comprehensive and detailed case studies

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ACTIVITIES (CONTINUED)

Minnesota FPA Annual Symposium, Minneapolis, MN, October 2010
- Panel Member: "Financial Essentials - What's Your Plan?"

Virginia Tech's Women in Financial Planning Mentorship Program, Mentor, January 2015 – December 2017
- Mentored one female VT financial planning graduate each year to support, nurture, and encourage her professional development and growth

CFP® Board of Standards, Inc., Subject Matter Expert for the CFP® Certification Exam, September 2016
- Developed exam questions for use on future CFP® Board examinations

AccountAbility Minnesota (AAM), Volunteer Tax Preparer, January 2012 - April 2014
- Volunteered 85+ hours working one-on-one with low-income individuals to prepare their income tax returns

Charles Schwab IMPACT Conference, Chicago, IL, November 2012
- Panel Member: "Developing the Next Generation of Financial Advisors"

EDUCATION

B.S., Finance, CFP® Board Registered Program, May 2010
Minor: Leadership
Cum Laude
Virginia Polytechnic Institute and State University

CERTIFICATIONS & AWARDS

IRS Enrolled Agent, May 2016
CERTIFIED FINANCIAL PLANNER™, November 2012
Pamplin Rising Young Alum Award, 2018