Jesse R. Lineberry, CFP® **jrl3rnt@vt.edu**

Work Experience: **Part-time Instructor:** Department of Finance, Insurance & Business Law; Virginia Tech, Blacksburg, VA August 2018-Present

- Taught 5 semesters of Fin 2114 Invest & Financial Literacy before being promoted to teaching Fin 3124 Financial Planning for Professionals in Spring 2021.
- Responsible for effectively delivering academic lectures on a variety of personal finance topics including investment management, insurance, cash management, tax, retirement planning, and estate planning & execution.
- Create and grade coursework with integrity and attention to detail.
- Work with fellow faculty member to create consistency across multiple course sections
- Engage with students to ensure concepts are understood and appropriately applied now and upon graduation.

Account Executive (Remote): New Planner Recruiting, Athens, GA October 2018- Present

- Manage client and candidate relationships for all of New Planner Recruiting's job openings.
- Facilitate interviews with and provide mentorship for current and aspiring financial planners.
- Create social media content to market job opportunities and engage with potential candidates.
- Attend industry conferences to network with thought leaders and stay abreast of trends within financial planning.

Financial Planner: OLIO Financial Planning, Blacksburg, VA. July 2017-September 2018

- Responsible for the development of client-friendly, educational content and resources, including presentations and financial planning tools.
- Deliver and present financial planning recommendations across the six areas of financial planning to a wide range of age groups.
- Act as the primary internal contact for OLIO's GenXY platform; specializing in providing recent graduates with the financial knowledge to navigate life's challenges.

Investment Operations & Client Service Apprentice: Gordon Asset Management, LLC, Durham, NC. June 2014-June 2017

- Responsible for the maintenance, implementation, and oversight of the firm's financial planning, managed account aggregation, and client relationship management software.
- Served as second chair on nearly 100 client relationships with duties including: internal point of contact for clients, the preparation of all meeting materials, and the presentation and execution of planning/investing strategies.
- Extensive experience with the day-to-day operations of a RIA such as: client paperwork, trading, investment analytics, financial planning research, drafting short articles for community magazines, managing phones, and client correspondence.

Teaching Assistant: Virginia Tech, Blacksburg, VA. August 2013-May 2014

- Responsible for assisting professor with lectures, both on and off campus.
- Assisted with the creation of lesson plans, assignments, exams, and grading.
- Required to actively participate in classroom lectures and discussions; hold office hours to assist and tutor students; and offer review sessions for exams in *AAEC 3104: Financial Planning for Professionals* and *AAEC 2104: Personal Financial Planning*.

Education: **M.S. Finance Candidate** Expected: May 2022
Auburn University, Auburn AL

B.S. Applied Economic Management
Option: Financial Planning
Virginia Polytechnic Institute & State University (Virginia Tech), Blacksburg VA
CFP® Exam, 2014
NASAA Series 65: Uniform Investment Adviser Law Exam, 2014