Jesse R. Lineberry, MSF, CFP®

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Education

Auburn University, Auburn AL
M. S., Finance**,** May 2022

Virginia Polytechnic Institute & State University (Virginia Tech), Blacksburg VA
B. S., Applied Economic Management, May 2014 Option: Financial Planning

Professional Experience

Assistant Professor of Practice & Financial Planning Program Director: **Dept. of Finance, Insurance & Business Law**; Virginia Tech, Blacksburg, VA. July 2022 – Present

- Required to teach Financial Planning Technology & Modeling (Fin 4114) along with the CFP Capstone, Fin 4134 Financial Planning Applications.
- Ensure all courses in the CFP curriculum align with CFP Board requirements.
- Lead students to national and regional conferences and networking events.
- Work with hiring firms and students to aid placement in the financial planning profession, including the review of 100+ resumes per academic year, and the facilitation of mock and live interviews.
- Serve at the Financial Planning Association faculty lead, including the solicitation and scheduling of speakers.
- Work with alumni and key stakeholders to enhance the financial viability of the program.

Instructor of Finance: **Dept. of Finance, Insurance & Business Law**; Virginia Tech, Blacksburg, VA. August 2018 – July 2022

- Taught 5 semesters of Fin 2114: *Investment & Financial Literacy*, a general education course and 3 semesters of Fin 3124: *Financial Planning for Professionals*, the introductory course for the CFP® option.
- Proactively engage with students to ensure concepts are understood and appropriately applied in accordance with CFP Board requirements.
- Student Perception of Teaching (SPOT) evaluations have ranked above the department average for every semester taught while maintaining strict academic rigor.

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

- Independently facilitate the hiring process for financial planning firms across the U.S.
- Review resumes, conduct interviews, provide mentorship for current and aspiring financial planners, and manage client and candidate relationships for assigned job openings.
- Attend industry conferences and draft relevant content for internal and external blog postings.
- Serve as the direct report for team members and facilitate the training of new employees.
- Co-authored "*How to Study For (And Pass) The CFP Exam"* published on Michael Kitces' widely distributed Nerds Eye View Blog and was later syndicated by *Financial Planning Magazine*.

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.
- Developed and presented financial plans encompassing the six areas of financial planning to clients across the age span.
- Primary contact for the GenXY platform, specializing in providing recent graduates with advice to navigate life's financial 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 ~100 client relationships, responsible for internal point of contact for clients, preparation of all meeting materials, and presentation and execution of planning/investing strategies.
- Extensive experience with the day-to-day operations of the firm, such as: client paperwork, trading, investment analytics, financial planning research, drafting short articles for community magazines, managing phones, and client correspondence.

Teaching Assistant: **Dept. of Agricultural & Applied Economics**, Virginia Tech, Blacksburg, VA. August 2013 **-** May 2014

- Responsible for assisting professor with lectures, both on campus with students and off campus with adult audiences.
- Assisted with the creation of lesson plans, assignments, exams, and grading.
- Actively participated in classroom lectures and discussions; held office hours and group review sessions to support students in *AAEC 3104: Financial Planning for Professionals* and *AAEC 2104: Personal Financial Planning.*

Professional Engagement

Print

Lineberry, J & Brown, C. Feb. 22, 2021. *How to Study For (And Pass) the CFP Exam.* https://www.kitces.com/blog/certified-financial-planner-cfp-exam-how-to-study-pass-jesse-lineberry-caleb-brown/

Lineberry, J. Aug. 17, 2021. *Ask the Experts: Reward Credit Cards.* https://wallethub.com/credit-cards/rewards/#expert=Jesse_Lineberry

Lineberry, J. March 31, 2021. *Ask the Experts: Credit Card Offers*. Credit Card Offers, WalletHub. https://wallethub.com/credit-cards/#expert=Jesse_Lineberry

Lineberry, J. Oct. 28, 2020. *Ask the Experts: What are the Best Ways to Build Credit?* A. McCann, *States with the Highest & Lowest Credit Scores*, WalletHub. https://wallethub.com/edu/states-with-the-highest-lowest-credit-scores/79466#expert=Jesse_Lineberry

Lineberry, J. Oct. 28, 2020. *Ask the Experts: Credit Cards, No Credit.* Best Credit Cards for People with No Credit, WalletHub. https://wallethub.com/credit-cards/no-credit/#expert=Jesse_Lineberry

Invited Presentations

Lineberry, J. (Feb. 24, 2022). Western Michigan Sanford Speaker Series: Trends in Hiring for Financial Planners, Virtual.

Lineberry, J. (March 17, 2021). University of Wisconsin, Eau Claire Advanced Wealth Management Class, Virtual.

Lineberry, J. (Feb. 5, 2021). *Getting Hired in Financial Planning*. FPA of Michigan Student Success Summit, Virtual.

Moore, H., Cosgriff, M., Lineberry, J. (Sept. 16, 2020). *Hiring Practices in Financial Planning*. FPA of Metro-NY NexGen Meeting, Virtual.

Lineberry, J. (Oct. 15, 2020). University of Georgia Financial Planning Speed Interviewing Event, Virtual.

Lineberry, J. (Oct. 13, 2020). *Getting Started in the Financial Planning Profession*. FPA of Central Virginia NexGen & Virginia Tech FPA Chapter, Virtual.

Technical Skills

- NASAA Series 65: Uniform Investment Adviser Law Exam, 2014
- Proficient with MoneyGuidePro, Orion, TRX, BNA Tax Planning Software, ByAllAccounts, Redtail, Salesforce, Bloomberg, Morningstar Office & Direct, Salesforce, the MS Office Suite, Banner, and Canvas