

Diego A. Shaw

(614) 813-1153

diegosshaw2021@gmail.com

[LinkedIn Profile](#)

Education

Mount Vernon Nazarene University, Mount Vernon, OH

- Pursuing a Bachelor of Science Degree in Finance, Financial Planning minor
- Eligible to sit for the CFP® Exam following graduation in May of 2025
- Cumulative GPA of 3.829 and Dean's List recognition
- eMoney Fundamentals Certified
- Completed Kingdom Advisors' Education Program and passed CKA certification exam

Experience

Blue Trust, Financial Planning Internship, Indianapolis, IN

- Interned in the division of private wealth collaborating with senior financial advisors and planners to evaluate client financial situations including cash flow management, investment allocation, taxes, insurance coverage, retirement planning, estate planning, and philanthropy
- Communicated with clients during client meetings and assisted in creating comprehensive financial reports and presentations for clients ensuring accuracy and alignment with client financial goals
- Proficient in industry tools and software such as eMoney Advisor, Orion Advisor, Wealthscape, CRM, Holistiplan, and Microsoft Excel
- Participated in team meetings and contributed ideas or solutions to enhance overall efficiency of financial planning workflow
- Planned, developed, and delivered a capstone project to the Indianapolis office associates addressing the impact of artificial intelligence within the financial planning industry

MVNU, Student Worker, Mount Vernon, OH

- Phonathon Caller: communicated with donors regarding the opportunity to support MVNU's University Fund, initiated ~100 phone calls per session for the two-month event, maintained phone records and donation pledges using Microsoft Excel
- Weight Room Manager: oversaw daily operations of the weight rooms on campus, scheduled and coordinated 50 workers, and ensured facilities met safety and cleanliness standards

Involvement & Achievements

MVNU Varsity Men's Soccer Player

- Daktronics Scholar-Athlete, Academic All-Crossroads League
- Participated in multiple community service projects with the team

Blue Trust Scholarship Recipient

- One of five undergraduate students selected nationally for demonstrating academic achievement and a passion for biblically-based financial advising

MVNU Diversity Scholarship Recipient

- Four-time recipient selected for academic, service, and leadership experiences as a student of a diverse background who is committed to cultivating campus integrity