

# Katelyn Silcox

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Manhattan, KS

## Education:

**Bachelor of Science in Personal Financial Planning**, expected May 2025

*Kansas State University*, Manhattan, KS

Kansas Insurance Certificate

Professional Strategic Selling Certificate

Eligible to sit for CFP® exam upon graduation

Cumulative **GPA: 3.8**; Scholastic Honors Student

## Work Experience:

**Tax and Financial Planning Intern**, December 2023-Present

*CGN Advisors*, Manhattan, KS

- Assist in the preparation, data entry, and filing of over 200 client tax returns within Intuit Proconnect tax software
- Manage client account services, including account setup and funding, ensuring timely and accurate processing and maintaining high levels of client and advisor satisfaction
- Conduct financial planning analysis and solutions in MoneyGuidePro and Orion Planning software, followed by the drafting of client deliverables
- Demonstrate strong communication skills in effectively communicating complex financial planning and tax concepts to clients and team members

**Peer Financial Counselor**, Spring 2023-May 2024

*Powercat Financial*, Kansas State University, Manhattan, KS

- Provided 1:1 peer counseling sessions with current and prospective students on a variety of financial topics including budgeting, student loans, credit, etc.
- Presented financial workshops to various groups regarding the topic of their choice
- Researched and wrote one blog each semester on an assigned financial topic

## Activities:

- Financial Services Leadership Institute Member- Events Committee, January 2024-Present
- Financial Planning Association Member, August 2023-Present
- Financial Well-Being Ambassador, August 2022-May 2024
- Invest-A-Cats Member, August 2022-December 2023

## Relevant Coursework:

- PFP 472 — Personal Income Tax Concepts
- PFP460 – Retirement Planning Concepts
- PFP462/482 – Investments Concepts I and II

## Awards & Honors:

- CFP Board – Investnet Scholarship Recipient
- Kansas Insurance Certificate Scholarship recipient
- The Ellis Foundation Scholarship recipient