

ETHAN OAKLEY

ethanoakley1456@yahoo.com

1242 Hawksview Rd. Franklinville
North Carolina, NC 27248

336-263-8078

EDUCATION

University of North Carolina at Chapel Hill - Peabody School of Education
Masters in Educational Innovation, Technology, and Entrepreneurship

Chapel Hill, NC
Class of 2026

Appalachian State University – Walker College of Business

Bachelor of Science in Business Management

Boone, NC

August 2020 – May 2024

- Developed understanding of business strategy, financial analysis, ethics, law, and leadership
- Honors /Awards: Dean's List, Cum Laude
- GPA: 3.5

WORK EXPERIENCE

Legacy Private Client Services

Private Wealth Management Intern

Raleigh, NC

May 2025 – August 2025

- Participated in UHNW client meetings and financial planning strategies
- Supported endowment development initiatives
- Assisted in firm wide AI research, integration, and implementation
- Analyzed portfolios and customized strategies to meet client goals, risk tolerance, and estate considerations
- Mentored by a top-ranked Forbes-listed wealth advisor

Security Ai

Business Development Representative Intern

Raleigh, NC

May 2024 – August 2024

- Conducted market research to identify and qualify high-value prospects
- Collaborated with teams across sales and marketing to analyze lead generation for sales representatives
- Participated in client meetings and presentations, helping to communicate product value to sales conversions

LEADERSHIP

NCAA Division 1 Wrestling

Team Captain

- Served as Team Captain at UNC (2024-2026) and Appalachian State University (2023-2024), leading training, competition strategy, and team development

Athletes in Business Club

Co-Founder and Co-President

Chapel Hill, NC

June 2025 – Current

- Co-founded and led organization connecting collegiate athletes to business and entrepreneurship opportunities
- Developed and executed programs, workshops, and networking events to enhance members' professional skills
- Built partnerships with local businesses and alumni to provide mentorship, internships, and career pathways

ADDITIONAL INFORMATION

Certifications: FINRA Securities Industry Essentials (SIE) — Passed (ID: T0513706)

Bloomberg Market Concepts (BMC), Bloomberg LP — Completed September 2025

Skills: Excel, PowerPoint, Understanding of Financial Markets and Behavioral Finance

Interests: Investing in Financial Markets, Real Estate investing, Relationship Building, Finance, Reading Books

LinkedIn: www.linkedin.com/in/ethanoakley

*References available upon request