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Financial Planning Students Take Second Place at National Competition

Winthrop University

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Financial Planning Students Take Second Place at National Competition

Quick Facts

- Cranford and Davis are recent financial planning graduates from Sharon, South Carolina, and Madison, Alabama, respectively.
- Philip Gibson acted as advisor for the team.



Cranford, left, and Davis

ROCK HILL, SOUTH CAROLINA — Imagine this: a family asks you to create a budget for them. The husband is a former member of the military and a current government contractor. He and his wife have two children, one of whom is preparing for college. They have complex financial needs—how do you help them?

This was the scenario that recent Winthrop University graduates **Kristin Cranford '15** and **Victoria Davis '15** faced at this year's **National Financial Plan Competition**, sponsored by the **International Association of Registered Financial Consultants** (IARFC). Out of the many teams that competed nationwide, Winthrop students placed second overall.

This is the first time Winthrop has had a team compete in the competition, said **Philip Gibson**, assistant professor of accounting in the **College of Business Administration** and the team's advisor. He had heard about the competition in the past, and when the IARFC invited Winthrop to participate, he immediately reached out to Cranford (Sharon, South Carolina) and Davis (Madison, Alabama), both financial planning majors.

The two students put together a comprehensive financial plan for the above real-life scenario presented to them. The plan had to include a budget, an evaluation of investments portfolio, retirement plans, insurance, tax plans and estate plans. They learned they had advanced to the semi-finals over spring break. A month later, they presented their plan to practitioners in the industry for feedback during the National Financial Plan Competition held at the Charlotte Motor Speedway.

"The IARFC Financial Competition was a wonderful experience which allowed Kristin and me to utilize our presenting skills, knowledge in financial planning, as well as exposed us to new industry information while allowing us to network," Davis said. "I would highly recommend that students coming through the financial planning program should participate in a competition like this."

"We are extremely proud of them," Gibson said. "They really put in, I'd say, hundreds of hours into this plan. They went beyond what they had learned in the classroom."

Gibson added that he would like Winthrop students to participate again in next year's competition.

Winthrop is one of two schools in South Carolina that has a Certified Financial Planner (CFP®) Board of Standards-approved financial planning program. This particular program is designed for those who wish to pursue a career as a financial planner, wealth manager, portfolio analyst, retirement specialist, etc.

For more information, [visit the CBA website](#) or call 803/323-2186.

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