



Coggin
College of Business

Women's Leadership Alliance

Financial Planning

Support

Stewardship

Report

FALL 2024 - SPRING 2025

EMPOWERING FUTURES

Support from the WLA scholarship has been instrumental in advancing student success across multiple areas. The WLA scholarship allows us to invest in meaningful experiences that extend beyond the classroom.

From sending students to national conferences and professional competitions to sponsoring impactful campus events and alumni engagement initiatives, every dollar is used to open doors, build networks, and inspire confidence.

This support plays a vital role in preparing our students for careers in financial planning and empowering them to become thoughtful, driven leaders in the field.





CFP BOARD CONFERENCE

SEPTEMBER 2024

In September 2024, four standout students — Raya Farooque, Sydney Bridges, Graciela Uribe Medrano, and Elisa Mullisi — attended the CFP Board Conference in Washington, DC, representing the strength and promise of UNF's financial planning program. The students participated in specialized workshops focused on the value of the CFP designation, the evolving future of financial planning, and the importance of mentorship for emerging advisors.

Notably, Raya Farooque and Sydney Bridges brought prior competitive experience to the conference, having participated in the 2022 and 2023 FPA Student Challenges, respectively. Both Raya and Gracie have also taken on leadership roles within UNF's Financial Planning Association student chapter.

As a direct outcome of the trip, Elisa Mullisi secured and accepted a position as a Wealth Advisor with Morgan Stanley in Washington, DC. In addition, Raya and Gracie were selected to serve as student liaisons between UNF and the CFP Board, coordinating communications and organizing on campus events throughout the academic year.

The students also had the opportunity to explore the nation's capital, making the experience both professionally enriching and personally memorable.

AMERIPRISE FINANCIAL CONNEXTION FINANCIAL PLANNING COMPETITION

FEBRUARY 2025



UNF proudly fielded three all-female teams for the 2025 Ameriprise Financial ConNEXTion Financial Planning Competition: Sydney Bridges (solo competitor), Rio Stennet and Nichole Hou, and Madison Wofford and Rachel Skyles. Among more than 120 research paper submissions nationwide, Sydney Bridges was selected as a finalist and invited to participate in the prestigious ConNEXTion cruise, hosted by Ameriprise, Finseca, NAIFA, and Kutin Wealth Management.

As part of the competition, Sydney was required to deliver a comprehensive financial plan before a panel of judges, complete a series of knowledge-based live quizzes, and present an elevator pitch to industry professionals. Competing solo, she demonstrated exceptional skill and professionalism — ultimately earning 3rd place nationally in the competition.

Her performance not only highlighted the caliber of UNF's financial planning students but also showcased the growing presence of women in the financial advisory field.

BANK OF NEW YORK / PERSHING INVESTMENTS INSITE 2025

JUNE 2025

Six exceptional UNF students — Amina Zelehic, Kayla Phai, Raya Farooque, Valerie Solis, Valeria Diaz, and Madison Wofford — attended the prestigious INSITE 2025 Conference in Washington, DC, hosted by BNY Mellon | Pershing. UNF proudly represented the largest student delegation among 13 participating colleges and universities.

Throughout the four day event, students engaged in workshops, panel discussions, and breakout sessions centered on the future of the financial advisory profession. They also had the opportunity to hear directly from Pershing C suite executives and keynote speakers, including Kellyanne Conway and Olympic champion Simone Biles, with a special meet and greet experience with Biles, an unforgettable highlight of the trip.

To cap off the experience, the delegation visited the US Capitol for a private tour hosted by congressional interns from the office of Representative Aaron Bean (Florida District 4), followed by an impromptu meet and greet with the Congressman during a break in session.

Adding a personal touch to the experience, newly graduated Elisa Mullisi joined the group to share her journey from UNF student to JPMorgan Wealth Advisor, reinforcing the power of networking and the impact of WLA connections.

FPA / WLA FALL SPEAKER MEETING & INAUGURAL ALUMNI NIGHT

With the support of WLA, UNF hosted its annual FPA/WLA Fall Speaker Meeting, attended by students Mary Carter, Ilyada Gulcan, Victoria Fitzmorris, and Kaylee Smith. The event provided valuable professional development and industry insight to students pursuing careers in financial planning.

In April, we continued the collaboration through co-branding and co-sponsorship of the Financial Planning Association's inaugural Alumni Night. This special event brought together over 60 alumni, students, and local business partners. Graduates — including several past scholarship recipients — returned to campus to share their success stories and offer career advice to current students, strengthening the UNF financial planning community through mentorship and connection.



STUDENT THANK YOU REMARKS



Amina Zelihic

My name is Amina Zelihic, and I wanted to express my gratitude for this scholarship. This award is a high honor, and I truly appreciate the opportunity. To share a bit about myself, I enjoy being active on campus and equally enjoy spending quality time with my friends and family. My family is from Bosnia and Hercegovina, so I spend time with them here and also travel to Bosnia to visit my extended family, which is always a great experience.

I am pursuing a double major in Finance and Financial Planning at UNF and serve as the Director of Development for the Finance and Investment Society. I work hard in school, maintaining a 4.0 GPA and earning Dean's List recognition. In the future, I aim to become a financial advisor, make a difference in people's lives, and eventually lead a team or company. I want to reiterate how honored I am to have received this award. I deeply appreciate what the Women's Leadership Alliance Organization does and would love to become more involved in the program. Thank you for your unwavering support, for your efforts to help me in my career, and for recognizing my potential as a young woman.

STUDENT THANK YOU REMARKS

Sydney Bridges



I want to extend my heartfelt gratitude for the scholarship you have generously provided me for another academic year. Your contribution will undoubtedly have a significant impact on my academic journey at the University of North Florida. It has already allowed me to pursue opportunities that enrich both my professional skills and personal growth. For instance, I am currently serving as the Treasurer for the Financial Planning Association club, where I am gaining valuable leadership experience and building connections within the financial planning industry. Additionally, my previous internship at B&C Financial Advisors provided me with practical experience in investment planning, furthering my understanding of wealth management.

One of the highlights of my academic career so far was participating in the 2023 Financial Planning Challenge in Arizona, where my team placed 6th overall. This experience reinforced my passion for wealth management and advising, solidifying my commitment to pursue a double major in Finance and Financial Planning at UNF.

Looking ahead, I am eager to continue expanding my knowledge and skills through professional development opportunities such as the annual Delta Sigma Pi LEAD conference. Your investment in my education enables me to pursue these ambitions and further prepare myself for a successful career in the financial industry.

Over this summer, I had the privilege of completing a financial planning internship at Carson Group, where I worked collaboratively with fellow interns on five case study presentations and a comprehensive financial planning project. This experience sharpened my analytical skills and deepened my understanding of client-centered financial planning. During my internship, I actively engaged with financial planning software such as Money Guide and Salesforce, gaining hands-on experience that will be invaluable as I continue to advance in my studies and career. I also had the opportunity to support Carson Wealth's department in various projects related to customer relationship management and strategic planning efforts.

STUDENT THANK YOU REMARKS



Madison Wofford

My name is Madison Wofford, and I am from Jacksonville, Florida. "Thank you" is not enough to express my sincere gratitude for this scholarship. Your contribution to my educational funding is appreciated beyond a measurable amount.

My major is Financial Planning. I found a passion for finance and working with people very early in my life, and my grandpa and mother were the biggest influences on this career path choice. They inspired me to explore the opportunities this career can bring to me. My goal is to have the CFP designation behind my name one day. My favorite class was Financial Planning with Ron Heymann. He was the best professor and presented the information in a way that was both interesting and impactful.

This scholarship is truly a blessing in my life. Throughout my time at UNF, I have balanced one or even two full-time jobs alongside my studies, which has kept me extremely busy as a college student. However, I believe the lessons I've learned from managing so much at once will serve me well in the future. Thank you from the bottom of my heart for your generosity. I look forward to sharing with you in the future just how profoundly this opportunity has impacted me!

STUDENT THANK YOU REMARKS

Rachel Skyles



Thank you so much for your generous scholarship! This contribution will allow me to continue pursuing my CFP without accruing excessive debt. I love coaching volleyball, and this scholarship will make it possible for me to focus more on studying without needing to take on another job.

I am a dual major, studying both Finance and Financial Planning. I recently added Financial Planning as a second major after greatly enjoying the Financial Planning course I took with Ron Heymann last semester. Your generosity has made a significant impact on my educational journey, and I am so grateful for this opportunity. Thank you again for supporting my goals and allowing me to dedicate more time to my studies and passions.

STUDENT THANK YOU REMARKS



Valerie Solis

I am truly honored to receive the Women's Leadership Alliance Scholarship. Thank you for your generosity and investment in my future. As a first-generation Latina college student in finance, this scholarship represents more than financial support — it's a step toward achieving my goals. My parents immigrated in the 1980s in search of better opportunities, and their sacrifices continue to fuel my determination.

I am pursuing a double major in Finance and Financial Planning at the University of North Florida because I believe financial literacy has the power to change lives. My goal is to become a financial advisor specializing in helping Hispanic families navigate financial literacy and homeownership. As a bilingual speaker, I hope to bridge language barriers, just as I have done for my family throughout my life.

This scholarship alleviates financial pressure and allows me to focus on my education and career transition. Currently, I balance early morning shifts while pursuing my studies to maintain financial independence. With your support, I can dedicate more time to my academics and secure a role aligned with my future in finance. Your generosity is not just helping me — it's empowering me to uplift others in my community.

STUDENT THANK YOU REMARKS

Mia Greenfield



I wanted to express my gratitude for your continued support over the past year. Thanks to your generosity, I was able to create my first financial plan, continue my internship, and begin my certification process.

This summer, I embarked on my studying journey for the SIE and Series 7 certifications. With your support, I have been able to fully immerse myself in the material, gaining a deeper understanding of the field I am entering. I am pleased to share that I sat for the SIE last month and passed on my first attempt – a small but significant victory in the right direction. I will be sitting for the Series 7 Top-Off just before the Fall semester begins in a few short weeks.

My goal is to pass the Series 7 this summer so that, by the time I graduate in December, I can hit the ground running in my job search. After graduation, I plan to take the necessary classes to earn a dual major in Financial Planning, which will mark the beginning of my journey toward obtaining the CFP certification.

None of this would have been possible without the support of this organization. I greatly appreciate the confidence and motivation that have come along with it. Thank you again for giving me a chance at a brighter future.

Thank
You