Luke Andrus

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EDUCATION

Brigham Young University-Idaho, Rexburg, ID Graduating Dec. 2026
B.S. Financial Economics & Minor in Financial Planning
Relevant Coursework: Financial Planning, Income Taxation, Investment Analysis, Risk Management, Estate Planning, Psychology of Financial Planning, Spreadsheet Analysis, Ethics & Derivatives, Financial Planning Capstone

SKILLSETS

MS Excel, eMoney, RightCapital, MoneyGuidePro, Riskalyze (Nitrogen), Interpersonal Communication, Team Focused

PROFESSIONAL CERTIFICATIONS & MEMBERSHIPS

Series 65 License Passed Nov. 2024
CFP Certification: In Progress Anticipated Exam: Nov. 2026

- Exam eligible
- CFP approved experience hours to date: 763 / 6,000

Enrolled Agent (EA) Designation Anticipated Exam: Dec. 2026
eMoney Certified Feb. 2026
Holistiplan Certified Nov. 2025

RELATED EXPERIENCE

Paul Comstock Partners (Family Office), Houston, TX Apr. – Aug. 2026
Financial Planning Intern

- Executed YTD realized gains SQL queries across 200+ client asset allocations for tax-efficient recommendations
- Audited and corrected fee schedules and AUM data across 100+ client accounts in CRM, improving billing accuracy
- Vetted formatting and compiled data across 20+ quarterly client reports, cutting analyst turnaround time

H&R Block, Rexburg, ID Tax Season 2025 & 2026
Tax Specialist

- Prepared individual tax returns for 75+ clients, maximizing available deductions and credits
- Taught tax concepts and return implications to 75+ clients in clear, understandable language
- Cross-referenced IRS publications and tax code to ensure compliant filings

Archvest Wealth Advisors, Walnut Creek, CA Jun. – Aug. 2025
Financial Planning Intern

- Migrated 100+ client financial plans from MoneyGuidePro to RightCapital
- Developed standardized workflow, reducing average migration time per client plan
- Collaborated with senior advisors daily to ensure client data accuracy and maintain compliance

LEADERSHIP & VOLUNTEER ACTIVITIES

BYU-Idaho Wealth Management Society, Rexburg, ID 2024 – Present
Marketing Lead

- Mentored 40+ students through a financial planning case study using eMoney
- Assisted in planning, organization, and supporting leadership of 40+ students twice a week

SIDE PROJECTS

Investing & Tax Planning Website In Progress
Website Lead

- Designing and developing a financial literacy website to guide BYU-Idaho students toward prudent investment stewardship after completing the school’s financial coaching program
- Architecting a tiered "how" vs. "how & why" content structure across multiple prototypes to balance accessibility with depth and maximize engagement.