**M. T. SMITH, MBA**

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| **SUMMARY OF QUALIFICATIONS** |

Dedicated, energetic, flexible and self-motivated business professional with the proven ability to adapt and excel in a demanding and deadline driven work environment. Principle strengths include strong leadership, analytical, trouble-shooting, problem-solving, crisis management, interpersonal, oral and written communication skills. Detail, action and results oriented team player with the demonstrated capability to build rapport, provide excellent customer service and execute resourcefully.

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| **PROFESSIONAL WORK EXPERIENCE** |

**WORLD FINANCIAL GROUP 6/12-PRESENT**

**Financial Educator/Coach**

* Analyze client's financial status and assess suitability and risk tolerance.
* Discuss financial options with client.
* Perform financial analysis by developing a plan based on data determining client's assets, liabilities, cash flow, insurance coverage, healthcare, tax status and financial objectives.
* Develop a strategy that minimizes client’s tax burden while maximizing earnings utilizing knowledge of tax and investment strategies, securities, insurance, pension plans and real estate.
* Maintain contact with clients to revise plans based on modified needs of clients or changes in the investment market.

**Team Leader/Trainer**

* Recruit and train on various company financial policies, practices and system.
* Mentor and provide positive and inspirational guidance for self-sufficiency and self-improvement to obtain personal financial success.
* Streamline the creation of a hybrid business model that rewards production, leadership development and business ownership.
* Organize and maintain an energetic and positive training environment.
* Focus on specifying target markets, marketing mix and products/services to create productive sales and marketing activities.
* Establish goal setting which involves specific, measurable, achievable, realistic and timely (S.M.A.R.T ) goals for business succession and client satisfaction.

**CRYSTAL STAIRS, INC. – LOS ANGELES, CA 08/01-12/13**

**Case Management Specialist/Trainer/Database Consultant** **03/06-12/13**

***Administrative Aptitude***

* Counsel clients and provide supportive referral services including career, educational and family services.
* Provide critical information to parents and providers regarding program options and support.
* Perform heavy data entry functions for enrollment, verifying information and updating changes.
* Execute multiple tasks with great attention to detail.
* Streamline systems to obtain and compose documents from various departments.

***Operational Expertise***

* Train employees on company policies and procedures.
* Test new programs, correct system errors, update new forms and report to upper management.
* Test internal tracking system for efficiency and effectiveness.
* CDE/CalWorks/Stage 1: Determine eligibility and process enrollment upon verifying eligibility.
* Authorize families for childcare service in respect to state regulations.
* Maintain over 200 clients accurately and efficiently within strict dead-lines while exceeding goals and performance standards as assigned.

***Managerial Experience***

* Monitor cases for program compliance.
* Schedule and conduct required annual recertification interviews.
* Answer client inquiries received via phone and e-mail requiring immediate attention.
* Provide supportive referral services including career, educational and family services.
* Coordinate and resolve routine and non-routine problems as a liaison between internal departments and outside organizations.

***Leadership Skills***

* Maintain detailed and concise case notes for all files, needed for case management, supervisors and State auditors.
* Prepare follow-up communications for parents and providers, specific to each case.
* Participate in special projects, committees and ad hoc groups.
* Implement department policies, procedures and State guidelines, proven through performance reviews.
* Address escalated concerns of providers and parents through complete file review and follow-up to ensure satisfaction and resolution.

***Claims Assistant II*** **08/01-03/06**

* Maintain check verification file, check batching and distribution.
* Accurately log, analyze and process provider payments.
* Process payment adjustments, stop payments, affidavits and employment verifications.
* Maintain department standards of coding to assigned claims per caseload according to RMR payment rules and agency policies.
* Generate and analyze clean up reports to ensure accuracy of payment.

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| **EDUCATION** |

**University of Phoenix*- Master’s Degree*** **2009**

**Business Administration**

**University of Phoenix*- Bachelor’s Degree*** **2007**

**Business Management**

**Eisenhower High School 1997**

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| **TECHNICAL SKILLS & LICENSES** |

Expert in Microsoft Office: Word, Excel, PowerPoint, Access, Publisher, Photoshop, E-mail messaging, multiple Internet web browsers: Internet Explorer, Mozilla Firefox, Typing 55wpm, 10-Key (by touch)

**Life & Health License (current)**