

Justin Morrow, Program Manager

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LINKS

[Linkedin](#)

PROFILE

Justin focuses on working with the advisors on his team in the development of financial strategies, program management of service operations and provides client experience services. Justin is a representative of the Client Associate Growth Network - Western Division, which develops strategies to enhance the partnership of Client Associates and Wealth Management Advisors across Merrill Lynch Wealth Management. Justin has received the Merrill Lynch Wealth Management Top 100 Responsible Service Growth Award each year from 2017 through 2021, which is given to associates upholding Merrill Lynch's service excellence standards.

EMPLOYMENT HISTORY

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| Feb 2017 — Present | Registered Senior Wealth Management Client Associate, Bank of America Merrill Lynch | Seattle |
| | Responsible for relationship management of private, business clients and professional network, including researching, analyzing and presenting solutions within the certified financial planning categories. Hold one-on-one in-person and virtual meetings. Organize and plan virtual and in-person marketing events for attendees with 25+ people. Responsible for back-of-house operational planning with 401(k) and insurance, digital engagement efforts, and team website manager. | |
| Aug 2016 — Feb 2017 | Registered Wealth Management Client Associate, Bank of America Merrill Lynch | Seattle |
| | Responsible for building long-term stakeholder value with private clients, institutional clients and professional relationship network. Analyze client financial needs and offer solutions to improve outcomes through campaigns and individual consultation for insurance, annuity, banking, credit lending, taxes and estate planning. | |
| Jan 2016 — Aug 2016 | Business Analyst , Capital One | Seattle |
| | Built reports for C-suite to lead data driven decisions using descriptive and inferential statistics, which identified "bottlenecks" and implemented new and improved processes in 135 associate investment call center. Tracked, analyzed and interpreted trends in Net Promoter Score data for 60,000 incoming contacts per month via phone, email and chat. | |
| Jul 2013 — Dec 2015 | Client Service Manager & Learning Facilitator, Capital One | Seattle |
| | Co-leader of team responsible for management of 12-15 consultative service associates offering digital PaaS solutions for investment, cash flow and credit to US based clients. Developed and led Seattle client services team (~60 associates) FINRA Exam training program that taught complex material needed to pass industry Series 7 and 66 exams. Awarded compensation and stack-ranked associates based on service model performance. | |
| Jun 2012 — Jun 2013 | Client Service Supervisor, Escalations Lead & Interdepartmental Liaison, Capital One | Seattle |
| | Worked in coordination with product managers, legal and marketing and operations on customer-focused product redesigns for subscription based investment service. Also, took lead of complex client escalations, coordinating resolutions with C-suite to resolve with positive outcomes. Won 2012 associate of the year as voted by client service department peers. | |
| May 2011 — May 2012 | Lead Client Service Associate, Capital One | Seattle |
| | Took complex escalations and created win-win situations for clients and stakeholders. Negotiated settlements in conjunction with legal department to mitigate litigation costs. Worked with Risk Management Department to detect money laundering and fraud. Content writer for investment arm's client-facing website and targeted email marketing campaigns. Developed customer centric operation policies aligned to ease of use standards to increase revenue for the Sharebuilder investment service. Won 2011 associate of the year as voted by peers for dedication to client service. | |
| Mar 2010 — Apr 2011 | Client Services Associate, Capital One | Seattle |

Answered client communications regarding complex financial products/transactions for bank's investment division. Highest incentive earner in service group which promoted the ShareBuilder subscription model for dollar cost average investing platform. Multi-month rotation with digital product management focused on revising customer facing investing and legal content. Member of social media team for Facebook and Twitter. Won 2010 associate of the year as voted by peers for dedication to client service.

EDUCATION

Bachelor of Arts - BA, News/Editorial, Western Washington University

Bellingham

Master of Arts - MA, Sport Business Leadership , Albers School of Business and Economics at Seattle University

CFP® Certification, Certified Financial Planner Board of Standards, Inc.

Chartered Retirement Planning Counselor, College for Financial Planning

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| SKILLS | Ability to Work in a Team | Expert | Leadership Skills | Expert |
| | Adaptability | Expert | Excellent Communication Skills | Expert |

REFERENCES

References available upon request

INTERNSHIPS

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| Apr 2009 — Sep 2009 | Production Assistant, 710 ESPN Radio | Seattle |
| | Generated story ideas, provided research materials for interviews, assisted with guest booking and operating the control board for The John Clayton Show, Mariners pregame and post game shows and The Outdoor Line as part of college internship. | |
| Apr 2007 — Sep 2007 | Production Assistant and On Air Reporter, ESPN Radio | Everett |
| | Worked at Seahawks training camp as a reporter/intern for local ESPN radio affiliate. Completed on air daily reporting to talk about camp and also interviewed players and coaches, including Mike Holmgren, Shaun Alexander and Matt Hasselbeck. | |
| Aug 2005 — Oct 2005 | Production Assistant, ESPN Radio | Everett |
| | Edited audio clips for news-of-the-day segments for local radio show on ESPN radio and provided on air commentary. | |

COURSES

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| Sep 2007 — Dec 2007 | Sports Reporter, Western Washington University |
| Sep 2006 — Dec 2006 | Feature Article Writer, Western Washington University |
| Jan 2006 — Mar 2006 | Community Relations Manager and News Editor, Western Washington University |

HOBBIES

Hiking, interior design, home remodels, cooking and traveling