Justin Morrow, Program Manager

Seattle, United States, 3609692800, morrowjustin19@gmail.com

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

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 withing 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 ligation 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

SKILLS

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

REFERENCES

References available upon request

INTERNSHIPS

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

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