Pernell Celestine

UX | UI Designer

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ABOUT ME

Former financial planner developing strategies for various scenarios now focused on UX & UI design. Ready to utilize the insights learned in the financial industry to make it a more user-friendly place.

UX SKILLS

User Research

Information Architecture

Wireframing

Prototyping

User Testing

Affinity Mapping

DESIGN SKILLS

Sketch

Invision

Photoshop

After Effects

Adobe XD

TECH SKILLS

HTML

CSS

JavaScript

SOFT SKILLS

Analytics

Adaptive

Epic Collaborator

UX / UI PROJECTS

Sundaze, Oct 2019 - Current
Design website and web-based application to launch US operations of the e-commerce company.

Fitted Oct 2019 - Dec 2019
Design website and web-based application to launch US operations of the e-commerce company.

Xpert, Jan – Sept 2019
The app's mission is to provide access to an expert in any field and connect them with the right expert for the task at hand.

EDUCATION

CareerFoundry
Certificate (UX Design, UI Design and Front-End Development), Sept 2019

Alfred, State University of New York
Bachelor of Business Administration, May 2014
GPA: 3.42

EXPERIENCE

Negotiator, National Debt Relief Mar – Oct 2019
- Worked with attorneys and paralegals to resolve clients' accounts that have been placed at a law firm.
- Negotiated 400+ accounts per month by communicating client hardships, reviewing client's savings to determine which accounts should be settled.
- Settled 100+ accounts per month to save the amount of money the clients owed.
- Established and maintained relationships with law firms and creditors to secure settlements that are beneficial to the client.

Financial Planner, Brunch & Budget July – Sept 2018
- Met with clients in-person and via video conferencing to discuss their financial concerns.
- Onboarded clients onto the financial planning platform, wrote follow up summaries, and drafted recommendations.
- Reviewed client's cash flows to set more realistic spending targets and to raise spending habit awareness.
- Led client advocate calls to help with any financial matter that needed to be done on a monthly basis for most clients, and quarterly for others. For example, calling student loan companies to inquire about student loan forgiveness, getting credit card charges removed and calling investment companies to help rollover qualified retirement funds.

Financial Planning Associate, New York Life Aug 2014 – May 2018
- Identified issues with client's current financial situation and to design a well thought out integrated recommended plan that addressed client's goals, gaps and shortfalls.
- Created and delivered financial planning content at various conferences, in person visits and webinars- particularly new planner certification training.
- Worked individually on financial plans and recommended solutions.
Shared best practices regarding case design to ensure planners and staff are engaged in an efficient and repeatable process.
- Leveraged Salesforce data to strategize and identify training opportunities.
- Led software demonstrations to new subscribers which reduced incoming support calls by 15%.
- Occasionally tested and gave feedback on new software programs and communicated updates to existing programs.