**Wells Fargo Advisors, Greensboro, NC (June 2018 – Present)**

As a registered client associate for 2 advisory practices, I was responsible for the daily administrative operations including supervising a clerical clerk. Some of my tasks include assisting clients, screening FA calls, asset movement, equity trades, account maintenance, document creation and tracking, compliance documentation, performance report generation, and client presentation preparation. Additionally, I assist with estate processing, research problems, complete assigned projects, and was the teams’ contact management system and Excel specialist.

**Merrill, Lynch, Pierce, Fenner, & Smith Inc., Greensboro, NC (April 2016 – December 2016)**

I was selected for the Practice Management Development four year training program. I obtained Series 7, General Securities Representative and Series 66, Uniform Combined State Law licenses. Used Sales Force to manage pipeline and client relationships. Attended vendor meetings and presentation to learn about various financial product offerings and maintained marketing collateral files.

**AFS Intercultural Programs, New York, NY (April 2010 to April 2016)**

In my role as Team Development Specialist, I was accountable for the largest volume driven US territory for AFS Intercultural Programs. I managed the daily activities for 150+ volunteers in a highly regulated environment. Responsible for balancing competing revenue streams between Hosting and Sending national goals. Negotiated and mediated internal area team volunteer relationships, solving immediate crises that often involve high emotions, demonstrating flexibility and grace under pressure. A confident communicator, I provided skills that built long term relationships and future growth to the program at the local and national level.

**Key Responsibilities and Accomplishments:**

* Continually managed multiple simultaneous projects with varying levels of dependencies and competing priorities
* Diplomatically required and maintained volunteer and key stakeholders accountability to challenging tasks and deadlines
* Used PowerPoint and interactive methods to create and conduct presentations for training, and workshops delivered to various volunteer and community audiences that advocated the success and forwarded the mission of AFS Intercultural Programs.
* Managed pipeline, campaigns, and client relationships using proprietary CRM software.
* Analyzed survey results and statistical data to report trends and forecasting to executive management using Excel and internal custom applications.
* Planned and executed events ranging from social appreciation dinners/parties to multi-day conferences, including securing event sites, hotel accommodations, catering, agendas, speakers, support volunteers, entertainment, and airport transportation logistics.

## Software Development Experience

## I have ten years of experience in information technology focusing of financial systems including transitioning from contracts management to senior/lead developer. Additionally, I filled the roles of business analyst and project manager depending on the needs of the project and team

**Volvo Commercial Finance**, Greensboro, NC (1998 – 2000)

**Inmar Enterprises**, Winston-Salem, NC (1996 – 1998)

**Coopers & Lybrand**, Washington DC (1991 – 1995)

**Oracle Complex Systems Corp**., Arlington VA (1990-1991)

**Key Skills**

* Strong analytical skills with the ability to solicit needs from clients and translate business processes into flowcharts, data models, and object models and, ultimately, software solutions
* Specialty in gathering data from multiple sources such as spreadsheets, ASCII files, databases validating and formatting to create derived datasets for reporting.
* Gained positive reputation for my ability and persistence in finding code and process errors.
* Advanced SQL skills primarily with SQL Server, ORACLE, and Access databases.
* Primary development tools: Visual Basic, Access, Crystal Reports with experience using HTML, SQL Windows, Oracle\*Forms, and dBase
* Primary Analytic and Management tools: Visio, Data Modeler, ERwin, MS Project, and Excel.
* Technical Writer: RFP/Proposals; Business Requirement Documentation; Functional & Technical Specifications; Quality Assurance Plans

## Education

University of Oregon B.A. Japanese, Minor Business Administration

International Experience – Exchange Student to Japan, Site Evaluator Kirov, Russia