

DATABASE ADMINISTRATOR DATABASE ADMINISTRATOR DATABASE ADMINISTRATOR -  
VALLEY NATIONAL GROUP Easton, PA Work Experience DATABASE ADMINISTRATOR VALLEY  
NATIONAL GROUP February 2006 to Present Manage multiple custodial data transmissions to  
ensure successful daily retrieval and posting of investment pricing and transactions. Reconcile  
custodial account data daily and monthly to confirm accuracy reporting and ensure timely resolution  
of missing or incomplete data. Create procedures and train employees on best practices for using  
the CRM/Reporting software. Run rebalancing reports for financial advisor that creates trades to  
put client accounts in line with their current strategy. Work with financial advisor to enter data,  
analyze, and create recommendations for client financial plans to help them meet financial goals.  
Prepare individual tax returns involving all schedules for federal, multi-state, and local helping clients  
obtain the best outcome utilizing all credits, deductions, and tax savings applicable. Assisted as  
needed with administrative duties including answering the phone, scheduling appointments,  
handling mail, preparing and sending client mailings, running client reports, and greeting clients.  
As part of the compliance committee make sure the client database is in compliance with FINRA  
and SEC rules. When audited help by running reports and providing information as requested.  
Enter and maintain client personal and investment information in CRM/Reporting software. OFFICE  
SUPPORT CORDINATOR & TAX PREPARER H&R BLOCK January 2002 to February 2006  
Perform administrative duties including answering the phone, scheduling appointments, greeting  
clients, assisting clients with picking up tax returns and making payments. Attend weekly manager  
meetings and report back to office manager any updates and important information. Prepare  
individual tax returns with multiple schedules for federal, state, and local. Education B.S. in  
ACCOUNTING DESALES UNIVERSITY May 2019 A.S. in ACCOUNTING NORTHAMPTON  
COMMUNITY COLLEGE Skills Sharepoint, Excel, Outlook, Powerpoint, Word, Problem solver,  
Team player Additional Information SKILLS Series 65 License Passed SIE Exam Investnet  
Tamarac SharePoint and OneDrive Excel, Word, PowerPoint and Outlook CCH Axxess  
MoneyGuide Pro Problem Solver Team Player Strong Work Ethic

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