

Adam Ross Russell

4779 N. Williams Pl. Portland, Oregon 97217

203-379-7125 | arossrussell@gmail.com

Experience

Client Account Coordinator, **Fisher Investments**, *Portland OR*- December 2014-Present

- Top performer in operational onboarding for new client relationships of Fisher Investments
- Operational tasks include: custodial transfers and account openings, updating of internal reporting systems, client/custodian relationship building, account preparation for trading, and cost basis
- Responsibilities include: authorization to work with multiple financial custodians (TD Ameritrade, Merrill Lynch, UBS Financial, Fidelity Investments, Pershing LLC and Charles Schwab), coordinator for Wealthbuilder, TD Referral, and PCG clients
- Received performance bonuses in both June '15 and November '15, and a 5% salary raise in August '15.

Retail Sales Representative (Stop & Shop Advocate), **The Hershey Company**, *South Eastern CT*- June 2013

- Managed 31 major retail accounts throughout the state of CT, selling and merchandising Hershey products
- Analyzed and leveraged point of sale data to close sales conversations and drive results
- Creation of close business relationships and proficient use of technologies

Intern, **BetaSpring**, *Providence, Rhode Island*- January 2013

- Worked in BetaSpring entrepreneurial incubator, with BareTreeMedia Inc.
- Provided company with mobile application analytics, industry analytical data, and marketing help

Co-Founder, **R2E LLC**, *East Haven CT*, 2011-Present

- Founded small medical-based software called Formmation; used with Allscripts electronic health care records system
- Partnership with MBA Health Group

Intern, **The Small Things Organization**, *Nkoaranga Village, Tanzania*, August 2012

- Created and led an entrepreneurial grants pilot program centered around African families caring for orphaned children
- Organized and taught classes on basic business and agriculture
- Managed finances and distributed grants to participants

Education

Bryant University, Smithfield RI

Major: Entrepreneurship |**Minor:** Political Science

Graduated: May, 2013 *Cum Laude*

- **Study Abroad:** University of Western Australia, *Perth, AU*
- **Sophomore International Experience:** London and France, UK

Educational Projects

Bryant University, Smithfield, RI

Business Plan Project-Group Leader

- Managed a team to create a fictional company and develop a business plan

Entrepreneurship Starting a New Venture Project- Operations Manager

- Created a business plan for college marketing and promotions business

Entrepreneurship Managing a New Venture Project

- Small business consulting projects with companies Calorique, Nyash Health, and TTBuds Popcorn Co.
- Consulting included re-branding, financing and operational suggestions, changing of marketing schemes, and shifting of distribution channels

Independent Directed Study Project

- Small business entrepreneurship simulation, based around a GPS tracking technology business

Computer Skills

- Microsoft Office, PowerPoint, Excel, Flurry Analytics,
- Proficient use of iPad and selling applications such as Walmart's "Sparc", as well as financial accounting systems such as Fisher Investment's "FIN" database

References:

John Zych: Regional Sales Manager at The Hershey Company, Contact info: (774)248-4821, jzych@hersheys.com

Sandra Potter: Head of Entrepreneurship Department at Bryant University, Contact info: (401)330-0692

Jenna Hoerth: Client Service Associate Team Lead at Fisher Investments, Contact: 1(800)550-1071

Links: Formmation.com