

EVERETT K. BARNEY

LOCATED IN ORLANDO, FL. 32808/WORKING GLOBALLY
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EDUCATION

UNIVERSITY OF MIAMI
Herbert School of
Business

Fintech Bootcamp Program

FLORIDA STATE
UNIVERSITY
College of Business

MBA-Finance Concentration

YOUNGSTOWN STATE
UNIVERSITY

BS-Public Policy

CITY COLLEGE OF SAN
FRANCISCO

A.A.-Sociology

LICENCES

FINRA - Series 7
FINRA - Series 9/10
FINRA - Series 66

CERTIFICATIONS

PROJECT MANAGEMENT
PROFESSIONAL (PMP)
Level 1

August 2021

- Agile, Waterfall and Hybrid methodologies

CERTIFIED SCRUM MASTER
(CSM)

August 2021

FINANCIAL SERVICES

Robinhood Securities
Lead CX Operations Analyst

March 2021-Current

- Collaborate with Customer Experience, Engineering, and Product Management teams to implement equities, options and cryptocurrency trading operations strategies, including order execution, clearing, settlement, margin, user security, ACATs, ACH, and account opening.
- Train partner teams on processes. Analyze client communication to establish stop words for machine learning text analysis algorithms.
- Managed a cross functional team of front & backend software engineers, product operations, and customer experience representatives to enhance Robinhood's Price movement push notification system

Charles Schwab & Company
Sr Enhanced Relationship Specialist

November 2018 - February 2021

- Primary custodial relationship manager for 40 RIAs, executing back and middle office operational tasks such as account opening, retirement planning, money movement, trust administration, trade corrections, portfolio risk analytics, and alternative investment operations.
- Collaborated with RIA client service teams to collect and analyze data to develop portfolio management, client service and acquisition. Complex Accounts, Trust & Estates, Complex Solutions Team SME.
- Digital Account Opening - Collected, mined, organized and presented data from RIAs to determine need for fully digital account opening process during pre-planning project phase and collected qualitative data during post rollout phase.

USAA Investment Management Company **June 2016 - November 2018**
Financial Planning & Advice - Specialized Investment Service

- Provided full service holistic financial planning service current & retired armed services members & their families. Recommended suitable asset allocations, mutual funds, managed accounts and ETFs. Referred USAA members to USAA Bank, and Property and Casualty company when suitable
- Acted as team market analyst, providing economic, fund, and fixed income research for team Financial Advisors.

Merrill Lynch, Pierce & Fenner
Financial Advisor - Portfolio Analyst

January 2014 - June 2016

- Closed approximately \$4 million in new business by creating, planning and executing prospective client entertainment events and seminars. Recommended investment products and services based on client's suitability needs.
- Developed a sales deck and book of approved funds/managed portfolios for trainees

MARKETING/BRAND MANAGEMENT

PROGRAMMING SKILLS & SOFTWARE

Python ● ● ●
 SQL ● ● ●
 Solidity
 Machine Learning
 Jira
 Microsoft 365 (Azure)
 Oracle (NetSuite)

MEMBERSHIPS

- Black Orlando Tech
- FinTech Connector
- Junior Achievement
- Orlando African American Chamber of Commerce

RELEVANT COURSEWORK

MIT 15S12
 Blockchain and Money
 Gary Gensler

Stanford CS229
 Machine Learning
 Andrew Ng

University of Michigan
 Python for Everybody
 Charles Severance

Diageo North America PLC Sales Specialist

March 2013- December 2014

- Built relationships with key stakeholders with both on- and off-premise accounts. Partnered with distribution teams, business owners, regulators and key government officials to increase or maintain sales, and brand recognition within the region.
- Served as brand manager and local face for new brands being brought to market. Managed annual expense and promotional budgets. Special Developed digital & experiential marketing campaigns for the rollout of Don Julio Tequila to the Atlanta Metro Market.
- Managed event planners, promotional teams, caterers, and mixologists to execute large scale experiential marketing events.

NFL Atlanta Falcons Football Sponsorship Marketing Executive

2012 - 2013

- Collaborated with key sponsorship stakeholders to create marketing plans that executed sponsorship marketing goals. Create and approve print and digital signage for experiential marketing campaigns.
- Coordinated corporate partnership events to help connect sponsor brands with key internal celebrities and stakeholders.
- Executed a 25 city promotional tour to expand the Atlanta Falcons brand to surrounding markets.

LEADERSHIP

Make It Easy Tech (MIET) Labs: Current Founder/CEO

I lead a Data Analytics, Machine Learning and blockchain engineering Fintech Project Management firm creating user friendly applications that solve economic disparity issues.

Politikool Publishing Company: 2010 - 2012 Founder

- Started a political satire digital media company creating and distributing political education content on multiple media platforms.
- Led a team of 35 voter education and voting rights activists to register over 3,000 Florida voters. Our 6-person student executive team managed a local political satire news site (politikool.com) to educate young and disenfranchised voters across the state of Florida

Junior Achievement: 2015 - 2017 Program Manager

Built volunteer financial literacy training course to prepare area volunteers to teach Junior Achievement youth financial literacy education tools and curriculum.