

# Carlos Garcia

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## EDUCATION

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### Texas Wesleyan University

Fort Worth, Tx

Bachelor of Business Administration

Cumulative GPA: 3.9/4; Dean's List 2013-2016

Relevant Coursework: Finance, Excel, Word, Powerpoint; Negotiations; Project Team Lead

## WORK EXPERIENCE

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### Coinbase- Coinbase Risk Strategies -Remote (6 employee crypto hedge fund Startup)

New York, NY

Financial Hedge Fund Operations Analyst

Jul 2022 – April 2023

- Recognized by The Wall Street Journal for instrumental contributions in facilitating and supporting high-value transactions, totaling an impressive \$100 million, resulting in a substantial boost to revenue.
- Pioneered a pivotal role in driving organizational growth and transformation by spearheading the testing and successful implementation of revolutionary new products and structured solutions.
- Delivered daily reporting of profit and loss (P&L) for an extensive portfolio of structured products, trades, and services, providing comprehensive data that informed executive decisions and fueled transformative discussions to shape future strategic plans.
- Directed daily reconciliations with unwavering commitment to meticulous accuracy, ensuring real-time maintenance of accounts and balances and exemplifying a strong dedication to financial integrity and risk management.

### Coinbase Institutional Global Blockchain Operations

San Francisco, CA

Data Transaction Analyst

Feb 2022 – Jun 2022

- Led strategic initiative to transform a time-consuming cold storage process, reducing it from up to 24 hours to just 1 hour, resulting in an exceptional time savings of 95%.
- Orchestrated seamless global transactions for clients worldwide, ensuring timely execution and fostering strong client satisfaction, resulting in long-lasting relationships and repeat business.
- Conducted thorough reading and analysis of blockchain data and white papers to ensure comprehensive knowledge and safeguarding of client funds, resulting in an exceptional client-facing experience.

### Fidelity Investments-Ultra High Net Worth & High Net Worth

Nov 2020- Feb 2022

- Deliver exceptional, personalized service to clients with diverse asset portfolios (\$250K to \$100M), specializing in complex asset classes and derivatives. Maintain a zero-error approach, ensuring high client satisfaction and fostering long-lasting relationships.

### Fidelity Investments - Strategic Communications

May 2021-Feb 2022

- Led a high-performing team in proactively engaging with a broad audience during peak periods, reducing call volumes to stock brokers by 20% while ensuring 100% compliance with SEC guidelines. Successfully kept the public well-informed and up-to-date on crucial information and announcements.
- Recognized as a key contributing team at Fidelity Investments, awarded for outstanding impact as a top-performing team out of 60 teams.

### TD Ameritrade - Account Representative - New Accounts

May 2021-Feb 2022

- Led a pivotal role in achieving flawless client onboarding through expertly providing comprehensive support in new account openings, implementing meticulous documentation revisions, streamlining procedures, and spearheading the automation of the account opening process. Attained an impressive 13% reduction in client account opening barriers while unwaveringly upholding strict compliance with SEC regulations.

## ACTIVITIES

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### Enactus- Project Manager - Entrepreneurial Org

Jan 2013 – Jan 2016

- Led a strategic initiative at the university to enhance community access to healthier food choices while simultaneously driving revenue growth for local small businesses through a carefully curated supplier selection.

### TWU SOCCER TEAM

Texas, BA, Student Athlete Jan 2013 – Jan 2017

## ADDITIONAL

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**Technical Skills:** SQL, Javascript, HTML/CSS;

**Languages:** Fluent in English, Spanish; Conversational Proficiency in English & Spanish

**Certifications & Training:** SIE, Series 7, Series 63 FINRA, SEC Assigned