

CASEY NEUBAUER

implementation manager

CONTACT

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EXPERIENCE

Access Softek, Inc.

Implementation Manager | 2017-Present

New York, New York

- Collaborated and launched several of the company's largest and most complex projects
- Shortened the average project duration from contract signing to delivery
- Tasked with obtaining my financial advisor license to manage implementation of the new investment roboadvisor
- Implementation resource for data conversion and special projects
- 100% of go-live deadlines met

Creating for Justice, Inc.

Co-Founder, Executive Director of Operations | 2020-Present

New York, New York

- Responsible for the enhancement of the company's image by working closely with other professional, civic, and private organizations
- Collaborate with the Board of Directors and other non-profit organizations to ensure company's financial health
- Oversee and implement appropriate resources to guarantee the operations of the organization are appropriate

JPMorgan Chase & Co, N.A.

Private Client Banker | 2014-2017

New York, New York; Austin, Texas

- Ranked in the top percentile of Private Client Bankers nationwide
- Assisted clients with opening trust, estate, power of attorney, guardianship, and other types of accounts—including businesses such as sole proprietorships, LLCs, corporations, 501(c)(3)s, and partnerships

EDUCATION & TRAINING

Bachelor of Arts (B.A.), Advertising; Minor, Psychology

Iowa State University | 2013

Texas State University Exchange Program | 2011-2012

FINRA Series 65 Licensed Financial Advisor

SKILLS

Project Management

Cross-team communication

JIRA/Confluence

Scaled Agile Framework (SAFe)

Finance

Entrepreneurship

Marketing

