

BRADLEY DAVIS

San Francisco, CA 94108
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PROFESSIONAL EXPERIENCE

Ted Broomfield Law, P.C. San Francisco, CA

December 2018 – March 2020

Operations & Paralegal

- Creating, analyzing, and auditing legal documents; maintaining case calendar; tracking billable hours, P/L, and payroll for practice
- Spearheading marketing operations; developing custom reports on conversion rates; researching leads for client/prospect database

Independent Consultant, Business and Sales Operations San Francisco, CA

Fairygodboss

February 2018 – April 2019

- Defining territory/vertical strategy and sales targets, analyzing sales performance data and forecasting trends, designing and generating custom reports, revamping and tailoring CRM, researching and identifying potential leads
- Increased productivity of Sales Director by 20%

Newfront Insurance

July 2018 – September 2018

- Optimized agent on-boarding and importing of client database, advised on custom dashboard integration with Salesforce, managed partner relationships to drive new revenue and shorten payment cycles
- Won back the company \$106k in at-risk revenue

Wilshire Associates, Inc New York, NY & Jersey City, NJ

November 2005 – November 2017

Vice President, Analytics/Client Service (December 2015 – November 2017)

- Team lead for top account in Division (out of 97 accounts), responsible for 18% of annual revenue
- Migrated reporting operations for custodial client to dedicated environment, increasing efficiency 300%
- Partnered with London office colleagues on index licensing project for EMEA region clients
- Executed 98% asset coverage (95% mandate) for strategic partner's characteristics universe
- Pre-sales consulting for sales/marketing teams, and coordinated efforts for marketing materials and documentation library

Senior Associate, Analytics/Client Service (December 2013 – December 2015)

- Coordinated all reporting for Strategic Alliance partner covering 61 portfolios with NAV over \$40B
- Led team of 3 analysts providing client reporting solutions, consistently delivered before deadlines
- Leveraged return and factor models to decompose portfolios, evaluating interest rate, region, sector, quality and covariance
- Analyzed securities structural modeling for accurate analysis of investment risk and performance

Associate, Analytics/Client Services (December 2010 – December 2013)

- Specialized in investment analytics solutions - reporting, implementation, training for Division
- Top global performer in issue resolution – 2012, 2013
- Reconciled risk and performance data between different systems in client investment operations
- Relocated to London office for 3 months to rebuild analyst team supporting EMEA region

Additional Experience as a Analyst at Wilshire Associates

EDUCATION

University of California, Berkeley Extension, San Francisco, California

2020

Full Stack Web Development Certificate

State University of New York - Binghamton, Binghamton, New York

2005

Bachelor of Arts in History, Cum Laude

SKILLS

Technical Proficiency: HTML, CSS, JavaScript, jQuery, Node.js, SQL

Software Proficiency: Salesforce, Microsoft Office Suite (Word, Excel, PowerPoint), Google Suite Apps, Tableau, Zoominfo, LinkedIn Sales Navigator, Pipedrive, Wilshire Analytics products, IDC 360 View, Bloomberg, JIRA,