# Education

*University of Wisconsin, Milwaukee* BA, Economics December 2009 Related University Project

[*Effects of Outsourcing on Local Businesses*;](http://krueg337.wixsite.com/sowhatscience/single-post/2017/06/17/Economics-research-aims-to-gather-big-data-on-outsourcing-in-local-businesses) Professor Avik Chakrabarti, September 2008 - May 2009

# Experience

Wells Fargo Asset Management

*Consultant Relations Associate Director* 2018 - present

Provide day to day planning and support of Consultant Directors in new sales and client retention activities to help achieve revenue goals and maintain business.

* Develop presentations, prepare marketing and service materials, and manage the client/consultant/prospect questionnaire process.
* Fulfillment of monthly and quarterly reports and commentaries in addition to preparation of portfolio review material
* Participate and host meetings via conference call or occasionally in person and will direct and may chair those conversations.
* Prepare portfolio performance and competitive analysis, interpreting such data and making recommendations.
* Lead in creating presentations for EVP and Head of Institutional Client Group and Global Consultant Relations
* Research industry insights and prepare biweekly team newsletter, quarterly team newsletter

*RFP Specialist* 2017 - 2018

Support WFAM sales partners through completing proposals for new business and maintaining partnerships through ongoing due diligence requests. Grow product and industry knowledge working directly with team portfolio managers and product specialists and utilizing internal systems including Satuit, PMAPS, Unity, Capzone resources, along with others. Further assist the broader organization through various ad-hoc projects and develop new processes and systems for improved efficiencies.

*Associate Regional Director* 2015 - 2017

Largely responsible for proactive calls on Financial Advisors at various broker/dealers to communicate strategies that increase product sales within the Wells Fargo Funds. Partnering with field wholesalers to develop and execute on territory business plan to meet and exceed territory gross and net sales goal.

* Growing relationships by providing timely insight and value add becoming a trusted source of knowledge
* Generate territory sales plan through analysis of territory metrics to identify potential sales opportunities
* Developed salesforce-wide sales initiative increasing activity by 16%, revised internal referral systems, and was requested to lead SalesForce training for new hires.

PNC Bank

*Financial Specialist* 2014 - 2015

My role as a “financial concierge” allows me to focus on the client by working with partners to deliver the best client experience. I rely on all branch teammates, including tellers and bankers, to provide background information on our clients to formulate a customized plan to initiate client contact and guarantee a successful meeting.

Merrill Lynch

*Financial Advisor* 2013 - 2014

As a Merrill Lynch financial advisor, I strove to be the best in my field by assisting families, individuals, and organizations in the development of robust, long-term financial strategies. My goal was to thoroughly understand my clients’ financial priorities so that I may earn their trust.

* Achieved sales goals monthly by Maintaining high volume marketing activities including seminars, tele-marketing, and networking events
* Continuous educations and licensing to be on the forefront of all market news, and new product insights

Everbrite

McDonalds *Regional Account Manager* 2011 - 2013

Grew, maintained, and serviced the Florida territory of the company’s largest client, McDonalds. Consistently managed over 100 McDonalds remodel and rebuild locations as well as took care of all region issues. Exceeded monthly sales goals, projected over $4.5 million annually.

* Provided customer support through evaluation of signage requirements, negotiated installation costs, coordinated delivery and installation, final invoicing, and serviced damaged and defective products.
* Retained competition to less than 10% of all projects through valuable customer relationships and creative cost savings such as offering discount opportunities and coordinating shared freight opportunities.

LeSaint Logistics

*Logistics Engineer* 2010 - 2011

Responsible for providing dedicated engineering support to new and existing customer accounts. This involved the design, engineering, and costing of operational solutions in the areas of facility layout, distribution center process design, transportation, and process improvement. Promoted to project implementations role.

* Priced clients for warehousing, handling, and value added services. Pricing models are communicated to operations managers, customer service managers, sales persons, and vice president of sales.
* Created post-mortem analysis to review actual operations versus the proposed model to identify added efficiency. Develop quarterly and annual business reviews (QBR, ABR) that illustrate the client’s current key performance indicators and future goals.
* Supported project implementations manager with responsibilities including: writing documents such as statements of work and standard operating procedures, and project timeline management to ensure flawless execution.

| **Additional Experience** |  |
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| Volunteer Center of Ozaukee County - Board Member, Secretary | 2012 - 2017 |
| Aids Resource Center of Wisconsin - Food Service Delivery | 2012 - 2013 |
| Re Ink, LLC (BkBid.com)  Owner/ President | 2006 - 2010 |

Planned and operated a startup website to assist college students in saving money on textbooks through a free online auction service, saving them a minimum of $50 a book per semester.

* Prepared business plans, negotiated legal aspects, managed web development overseas and domestically, and sought private funding.
* Hired and managed a group of interns for a summer program who developed a new website layout, marketing plan, and search engine optimization (SEO) strategy saving the company upwards of $150,000
* Formed relationships with local colleges and universities to implement a cost-effective marketing plan for over 35,000 students resulting in an immediate 20,000 site visits on launch day.

Magnet Group

Project Assistant 2008

Worked under the direction of the general contractor to complete the development of a $22 Million Condo development. Specific tasks included tracking construction timelines, optimizing organization methods, and ensuring project viability.

* Evaluated finances and inventory; created banking and inventory record keeping systems eliminating $200,000+ in errors
* Facilitated communications between contractors, engineers, designers, and realtors to maximize productivity
* Managed purchasing and installation of $1.5 million in unit furnishings for 57 luxury condominium units.

# Proficient in the following programs:

* Microsoft Word, Excel, PowerPoint, Access
* Adobe Illustrator, Photoshop
* SalesForce, Satuit
* eVestment, BrightScope, Directory, Zephyr