
 ramydaas@hotmail.com

 340.244.4878

## EDUCATION

### Bachelor of Science Finance

University of Tampa  
August 2020

## CRM Experience

Black Diamond Wealth Platform  
Salesforce  
Maestro  
Tableau

## SKILLS

### Microsoft Office

Word  
Excel  
PowerPoint  
OneNote

### Programing

HTML  
CSS  
JavaScript  
MySQL

## LANGUAGES

English  
Fluent

Arabic  
Semi-Fluent

# Ramy Daas

## PROFESSIONAL EXPERIENCE

### About

I am a self-driven individual looking to move into the cryptocurrency segment. Below my resume you will find data that illustrates my success in handling/reconciling large amounts of data, managing the billing of multiple advisory based accounts, relationship management, and business consulting. I have billed roughly \$54,000,000 to date on a quarterly basis (\$18MM/Quarter). I am looking to move into the crypto/blockchain segment, as I have a strong passion and understanding for the industry. I have been involved with the blockchain industry for about 6 years and have become well versed with smart contracts, decentralized/centralized exchanges, liquidity pools, staking, and more.

### J.W. Cole Financial, Inc.

*Tampa, FL (in office) — December 2020 - Present*

#### Advisory Fee Billing Specialist

Within JW Cole Financial, I manage the advisory billing for 200+ advisors located across the United States. I bill on a monthly & quarterly basis

- Efficiently manage over 200+ financial advisors billing & calculate financial advisor fee compensation at the gross level
- Develop various reports for advisors such as Inactive Account Reports, Monthly & Quarterly Billing Reports, Segmentation Reports,
- Review financial planning agreements, advisory agreements to ensure clients & advisors have filled out the paperwork to meet SEC guidelines
- Perform asset exclusion from billing on a weekly basis
- Collaboration with J.W. Cole's Advisor Solutions Group to provide fee billing strategy

### Ernst & Young, LLP

*Tampa, FL (remote) — September 2020 - November 2020*

#### Financial Planning Support Consultant (Contract Position):

- Educated & provided objective financial planning guidance to clients
- Assisted small businesses and individuals through government loan programs, including the Rapid Response Recovery Assistance Program (R3), and the CARES Act Funding loan programs across the United States
- Reviewed client documents to ensure they meet the requirements for the programs
- Worked in a virtual team environment with employees located across the country

### Contend Capital, LLC

*Tampa, FL (in office) — May 2019 - September 2019*

#### Vendor Finance Associate - Intern:

- Received exposure to the commercial finance industry, specifically the many facets of equipment finance
- Daily tasks included business development prospecting, social media marketing strategy, local networking, and financial underwriting
- Identified new business opportunities and potential vendor partner

### Cryptocurrency Experience

**Upwork Freelance Profile:** <https://www.upwork.com/freelancers/ramy>

- ERC20 & BEP20 Smart Contract Development
- Decentralized & Centralized Exchange Listing
- Assist with Tokenomics Strategy