Elizabeth O'Leary

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Profile

I thrive in a fast paced, detail oriented, mentally challenging environment which requires me to problem solve to find innovative solutions. These skills combined with my strong work ethic, consistently demonstrate to my customers and colleagues, I can be counted on for whatever challenge is presented.

Experience

OPERATIONS LEAD, INNOVATION LAB; SECURIAN FINANCIAL - MARCH 2017 - PRESENT
As the operations lead in the Innovation Lab, I have had the privilege to be involved in many projects and experiments. As an early member of the innovation lab team, I was involved in the creation of the Innovation Lab itself as well as its first and largest project, aimme, which was a financial app to help credit union customers find and save money. Other highlights of this role are:
- Maintain update, and forecast multi-million dollar budgets
- Maintain relationships with credit union partners as well as regional sales professionals for the aimme platform
- Acted as Project Manager for the development of two native apps (iOS and Android) including the coordination of an offshores team.
- Participated in the implementation of Robotic Process automation (RPA) for the enterprise including BA work and bot development
- Acted as Project Manager for a wearables project, determining if wearable data can be used in individual life insurance underwriting

ASSISTANT VICE PRESIDENT; MINNESOTA BANK AND TRUST; EDINA, MN – AUGUST 2011 - MARCH 2017
In this role, I helped create, implement, and work in the Private Client Services department. By providing exceptional service, in a high touch environment, I recruit, retain, and service Private Clients to MB&T by providing any financial service they require. Some highlights from this role include:
- Manage Retail Services and Private Client Services to ensure a professional, seamless and a compliant banking experience.
- In a single day, routinely juggle the expectations of clients on any matter of subjects from mortgages, investments, insurance, accounts, and technology.
- Served on implementation team for new CRM system including reviewing and selecting an appropriate solution for the bank's needs.
- Served on selection and implementation team for a new customer facing online banking system. Included revamping online presence and creation of a robust mobile app.
- I am the point of contact for the customer facing technology experience. I manage on-boarding of new clients as well as problem solve any technological issues.
- Developed, from scratch, a portfolio of 250 clients
- Manage $13,000,000 in deposits and $7,000,000 in consumer and commercial loans.
- Maintain professional high-end service for all customers, including sensitive high-profile customers in the public and private sector.
- By establishing quality relationships built on trust and competence, I am the primary destination for bank referrals.

My role in Private Banking has developed my skills managing all types of people. Most importantly, this job has been a tremendous outlet for my insatiable desire to help people via problem solving and managing countless projects and tasks simultaneously to positive outcomes.

MORTGAGE ASSOCIATE; WELLS FARGO BANK, NA; MINNEAPOLIS, MN; 2006 - 2011

During this time period, the mortgage industry experienced an unprecedented refinancing boom. Alongside my partner, I managed the mortgage practice which was consistently ranked in the Top 2 in the State of Minnesota for volume and customer service. I quickly identified and honed one of my core competencies: Managing details while still elevating above to coordinate many moving pieces. We closed nearly $90,000,000 and 200 loans annually, during a time where regulations were changing daily.

Education

Loyola University Chicago, Chicago, IL – BS, cum laude, 2004
Licensed Broker (Series 7 and 66) - 2016
Completed and passed all course work for Certified Financial Planner (CFP) - 2015
Life, Health, and Disability Insurance License - 2015
University of MN - Full Stack Web Development BootCamp

      Skills Include: Computer Science applied to Javascript (Data Structures and Algorithms)
                    Browser Based Technologies (HTML5, JavaScript, Responsive Design, Handlebars
                    React.js, CSS, jQuery, Bootstrap, Cookies, Local Storage)
                    Java
                    Deployment (Heroku, Git, Github Pages)
                    Databases (MySQL, MongoDB)
                    Node.js (Server Side Deployment, Express, Security and Session Storage, User Authentication, MERN Stack)