**Donna Ivy**

Lancaster, Texas 75134

Mobile: 469-877-4380 **Email:** [**divy3@sbcglobal.net**](mailto:divy3@sbcglobal.net) Home: 972-228-9266

**PROFILE**

Detail oriented, dedicated, and highly motivated professional with 10 plus years of experience in the financial services industry. Proven ability to build and maintain strong alliances while training team members within the operations area. Respond to challenges with confidence, determination and focus. Proficient in communication both verbal and written, problem solving, customer service, multitasking, critical skills, CRM, banking and investment account transactions and analytical thinking.

**EDUCATION**

**University of North Texas at Dallas –** Dallas, Texas, 2017

Masters of Business Administration with Strategic Management

**University of North Texas** – Dallas, Texas, 2012

Bachelor of Applied Arts and Science with concentration Accounting and Business Management

**Cedar Valley College –** Lancaster, Texas, 2007

Associate in Applied Science Accounting

**PROFESSIONAL EXPERIENCE**

**Dallas Independent School District** October 2016 - Present

**7th Grade Reading Permanent Sub**

Coordinated information request between administrator and teacher team. Developed strategic lessons plans for students using excel spreadsheet. Directed students with homework and other queries

**University of North Texas at Dallas** August 2016 – February 2017

**Student Assistant II - Finance**

Research and answered students question related to finance. Assisted with the necessary tutoring, homework, and study assistance. Assisted undergraduates with finance course study. Administered excel and power point with the creation of “finance handouts”

**Life Restoration Outreach Ministry, Independent Contractor** April 2013 – April 2016

**Financial Office Manager-Coordinator**

Directed and provided financial management to ministerial leaders and others. Created and track receipt of various paperwork for vendors and patron. Assisted with the development of policies, procedures, and office coordinator. Supervised financial data, annual audit and spreadsheets. Assisted with 501c3 and other state mandated documents

**Ada\*Staff Agency** October 2015 – November 2016

**Administrative Assistant- Data Entry**

Assisted professors with administering and monitoring test, ability to be proactive in solving problems, willingness to learn, responsible for assisting ADA disability students. Data management for Dallas Independent School Medicaid Division

**Big Brothers Big Sisters** August 2014 – June 2015

**Staff Accountant**

Maintained and controlled the General Ledger accounts and business transactions of the organization. Applied General Accepted Accounting Principles (GAAP) including analytical work and thorough review of financial records. Managed the processing of cash receipts, recording of revenue and receivables. supervised the preparation of financial reports. Administered in creating policies, procedures and assisted auditors with tax preparation

**JP Morgan Securities** August 1991 – August 2013

**Financial Margin Analyst**

Processed all incoming and outgoing monies, securities transfers, client on-boarding and documentation. Assisted financial advisors and client service associates with daily operational related items while multitasking and monitoring risk management reports for the firm. Process bank reconciliation, process accounts payable and accounts receivable transactions in a timely manner while ensuring accuracy. Prepare check request, strong verbal and written communication. CRM system and client on-boarding.

**SKILLS/SOFTWARE**

●Proficient in Microsoft Office

●HP Remit Pro Check System

●Bank Reconciliation

●Accounts Receivables

●Accounts Payable

● Bookkeeping

●Abilia MIP Sage Accounting System

●Pivot Tables

●Account Manager

● Audit

●AS400

●Office Coordinator

V**OLUNTEER/ACCOMPLISHMENT**

Seagoville Middle School 2016-2018; Mentor for 6th graders transitioning to 7th graders

New Birth Missionary Baptist Church 2015; tutoring for Reading and Math

Future Without Poverty; 2011-2012 Vice –President assisting with building raise bed for planting needs

University of North Texas 2011, Dean’s List

Cedar Valley College 2007, Dean’s List

Phi Theta Kappa Honor Society, 2007

The Family Place, 2010-2011; volunteered in annual donations set up with JP Morgan Securities