

Financial Services Experience

JEFFERIES (investment bank)

Vice President (Private Wealth Management) - Boston, MA (2019- 2020) Series 7, 63, & 65

- Prospected and marketed private wealth management strategies and executive services to individuals, family offices, and endowments. Prospected and marketed equity and fixed income trading/research capabilities to mid-market and small sized money managers, hedge funds, and investment advisors. Facilitated access to research, analysts, and conferences to trading clients. Solicited indications of interest for capital market deals and facilitated allocations of syndicate. Conducted equity trading, booking, and settlement.

PRIME BUCHHOLZ (investment consulting firm)

Performance Analyst - Portsmouth, NH (2019)

- Analyzed the performance and cash flows of client investments, including private equity funds, hedge funds, mutual funds, exchange traded funds, fixed income, and money markets. Prepared and disseminated monthly and quarterly client performance reports.

AMERICAN ELM DISTRIBUTION PARTNERS (selling agent for Arboretum Investment Advisors)

Regional Investment Consultant - Portsmouth, NH (2018- 2019) Series 7 & 63

- Full cycle sales of our broker-dealer fund in the western territory of the United States through our broker-dealer selling agreements. Internal wholesaling of our institutional fund to Registered Investment Advisors.

FIDELITY INVESTMENTS (financial services firm)

Investment Solutions Representative - Merrimack, NH (2015- 2016) Series 66, 7, & 63

- Assisted in retirement planning and consolidation of client accounts, including investment guidance, positioning managed accounts, discovery and positioning of Fidelity Investments for outside assets, rollovers, and transfers of assets. Provided exceptional client service through trading, money movement, addressing client inquiries, and account maintenance.
- (Q4 2015) 179% of goal for net new money. (Q3 2015) 150% of goal for net new money and a top five producing sales representative in the Merrimack site. (Q2 2015) 112% of goal for net new money. Excellence in customer service award (Q1 2015, Q2 2015, Q3 2015) Discretionary money managed accounts prospecting call contest winner.

Financial Representative, (Full Trader) - Merrimack, NH (2014- 2015) Series 7 & 63

- Provided exceptional client service through trading, money movement, addressing client inquiries, and account maintenance.
- Golden Call winner in new hire service (November 2014)

Enterprise Technology Experience

DATADOG (enterprise performance monitoring software)

Account Executive - Boston, MA (2017)

- Full cycle business to business sales, focused entirely on net new logos.
- 2nd Ranked AE for Net New Bookings in the South East Territory in September 2017. 4th Place Finisher in Two Week Sales Competition for Net New Bookings in September 2017.

EXTRAHOP NETWORKS (enterprise security and performance monitoring software)

Inside Sales Representative - Boston, MA (2016- 2017)

- Business development and inside sales, focused entirely on scheduling meetings with net new logos.
- (March 2017) 114% of goal. (January 2017) 108% of goal. Second ranked inside sales representative in meetings held (November 2016) 127% of goal. Top inside sales representative in meetings held and tied inside sales record for most meetings set in company history for Eastern Canada (Q4 2016). Second place in Q4 sales competition for the inside sales team.

Education and Computer Skills

EDUCATION - University of New Hampshire, Durham, NH (2010- 2014) - Bachelor of Science, University of New Hampshire Sales Club (2014), Wildcat Sports Properties, Advertising & Sales Intern (2013- 2014), Over 75 Hours of Unpaid Volunteerism (2014)

COMPUTER SKILLS & TECHNOLOGIES - JavaScript, jQuery, HTML, CSS, Bootstrap, Git, Bloomberg, IPreo, Fidessa, FactSet, Wealth IQ, NetX360, Microsoft Office Suite (Outlook, Word, Excel, PowerPoint), Google Suite, Salesforce, Siebel, Mainframe, FocusPoint, LinkedIn Sales Navigator, Paris