

Jackie Farnsworth

An analytical service professional with over 15 years experience of finding solutions, researching problems, assisting internal and external clients. Over 13 years of experience in developing and delivering training/instruction materials. Over 7 years as the subject matter expertise for internal and external teams, as well as business partners. Over 7 years of project experience.

Selected Achievements

- Responsible for creating, maintaining and posting over 250 training documents & resource materials to internal website.
- Winner of Operations First award for an innovation idea, Shining Star award for work on a mapping project and multiple Spot awards.
- Subject Matter Expert (SME) for project team that created a Data Capture Automation Workflow program. This reduced account application processing from 16 minutes to 4 ½ minutes per form, reduced beneficiary processing from 12 minutes to 2 ½ minutes per form, with over 90% error reduction and over \$250,000 in savings per year. Offered numerous improvement suggestions that were implemented and conducted systems testing. Contributed to existing forms being reconfigured for straight through processing which enabled increase efficiencies of up to 70% being systematically processed.

Experience

Fidelity Investments

Workleader (Non-profit Retirement Plans)

Managed a team of 15 associates. Analyzed management reports and distributed assignments to department associates daily. Conducted quality control validation on work performed by associates. Subject matter expert for department management and associates. Liaison for off-shore business partner. Contributing member for multiple different project teams with various levels of management. Responsible for multiple projects. Created training programs, documents, compile resources and trained associates. Provide enhancement suggestions and perform testing on automated software workflow system updates.

Sr. Transaction Operations Specialist (Non-profit Retirement Plans)

Processed applications and maintenance on participant accounts. Designed and implemented workflow policy and procedure documents. SME on a project to automate account and beneficiary information. Developed procedures and implemented process improvements. Trained and mentor new hires. Contributed to company wide projects and initiatives.

Full Trader (Retail Brokerage Services)

Processed customer trades for mutual funds, stocks, bonds and options. Assisted customers with their questions, money transfers, account balances, stock quotes and educational needs. Tax gate representative during tax season.

Jones, Waldo, Holbrook & McDonough

Accounting Clerk /Special Project

Special project – Managed client data & deposits for an eighty-million dollar private offering.

Accounting Clerk – Completed monthly shareholder reports and spreadsheets. Assisted with Accounts Receivable, filed, cut checks and answered phones.

BYU Institutional Laundry/Textile Cleaning Services

Project Coordinator (during last summer; employed 3 years)

Created an instruction manual for each of the 16 different functions within the laundry. Helped establish inventory-counting procedures, developed an item classification system and location charts for a million dollar plus inventory.

Education

Bachelor's degree in Psychology with a minor in Business – Brigham Young University, Provo

Interests

Photography & Crafts

Programs

Microsoft Word, Excel, Outlook, PowerPoint, Publisher, OneNote, Adobe Photoshop, Adobe InDesign, WordPress and xMind (mind mapping software)