

# Tim Tuttle

Over 10 years sales and customer service experience, including management and operation of a successful personal business selling niche products on eBay. Developed skills in marketing and accounting through the management of this business. Known for attention to detail and the ability to quickly adapt to any situation, learn quickly, and easily master new systems, processes and workflows.

## EXPERIENCE

### **AutoPoint, South Jordan, UT — Accounts Receivable Lead**

2016 - PRESENT

Trained on Microsoft Dynamics Great Plains ERP. Emphasis on contract and ad hoc billing in a shared services environment. Cash application as part of the Hollander and Audatex AR team.

- Prepare and analyse AR aging reports for senior management
- Collection calls based on amount outstanding with goal of less than 4% outstanding more than 60 days
- Review and process all aspects of orders and contracts from beginning to end to ensure compliance with company policy
- Develop and document new practices within ERP based on outdated processes and review them with management to reduce wasted time and resources
- Reconciliation of customers payments and returns to bank account daily

### **Self Employed, Salt Lake City, UT — Internet Sales**

2008 - PRESENT

Started and operated a personal business selling on eBay with 25% increased profits each year for the last 5 years. Continue to have an edge in these markets by staying informed on current trends and adding additional product lines based upon them.

- Personally package and ship every item with less than 1% rate of return due to accurate item description and customer service standards learned in the retail sales environment
- Manage and perform all financing and reconciling of accounts payable and receivable
- Designed and developed Microsoft Excel spreadsheets to track profit and loss on each item bought and sold

### **Refined Wealth Management, SLC, UT — Business Development/Paraplanner**

MARCH 2014 - OCTOBER 2014

Quickly coordinated a conversion to paperless systems through the use of Dropbox and DocuSign apps. Learned financial planning and obtained Series 65 securities license.

- Integrated existing systems to work together including the CRM, Black Diamond Portfolio Reporter and NaviPlan planning software for increased efficiency
- Developed detailed financial plans for clients with mid to high net worth to get them on the right track towards their goals
- Administered workflow with account opening and service of over 300 accounts, set up banking instructions, distributions and tracked all account openings and service through custom created Excel spreadsheets
- Trained on the Pershing NetX360 trading platform and knowledgeable on block trading and rebalancing systems

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## SKILLS

Management and development of new processes

Proven sales and customer service excellence

Management reporting via spreadsheets and ERP software

Vendor Negotiation

## EDUCATION

### **University of Utah**

BS Finance 2009

### **Series 65**

Investment Adviser Representative Securities License

## VOLUNTEER EXPERIENCE

### **HOA President-White Maple Place Condominiums**

June 2014 - Present

Develop and review a fiscally responsible budget and establish reserve funds

Establish, publicize, and ensure compliance of bylaws