

Michael Lee

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S U M M A R Y

Outbound Payroll Integrations professional highly skilled in standard and custom automated outbound layout implementation. Partners successfully with internal and external partners and development team members to put out high-quality reports for customers.

C E R T I F I C A T I O N S

- Actuarial Exams passed FM, P, MLC. FAM-S anticipated Spring 2024
- University of Minnesota (edX) Full Stack Coding Boot Camp certificate anticipated November 2023

S K I L L S

- Excel, VBA
- SQL
- HTML, CSS, JavaScript

E X P E R I E N C E

Senior Integration Manager | Principal Financial Group - Des Moines, IA | 09/2020 - Current

- Tested outbound functionality, performance, and compliance of migrated IRT contracts against design specifications during IRT migration.
- Coordinated with leadership on anticipating impacts and consequences of SECURE Act 2.0 from an outbound perspective and helped create a plan of action for Roth and Roth Catch-Up adds to reverse feeds.
- Acted as Payroll Solutions lead resource on obscure outbound related topics, such as Match Transaction Triggering, IRT layouts, and new layout offerings.
- Engaged with the Payroll Squad on a daily basis to work through bug fixes, product enhancements, and custom file setups.
- Tested new Ceridian preferred outbound layout during development, and then coordinated between clients and the Payroll Squad in production implementation. Created VBA tools to reformat one-liner XML files produced by the Payroll Squad into stacked readable formats to be more easily reviewed.
- Solved unique business problems for institutional sized clients by utilizing available resources in unconventional ways with VBA.
- Supported technical writers in writing and implementing outbound procedures for Payroll Solutions.
- Worked with internal FTP teams in connecting to external customer servers to allow secure file exchange, sometimes with PGP keys or SSH keys. Partner with Client Services to resolve incidents when FTP failures occur.
- In extraordinary circumstances, keyed complicated reverse feeds from scratch using reports and system data to determine which elections to send.

Auto Services Specialist | Wells Fargo - Roseville, MN | 11/2017 - 08/2020

- Provided oversight and guidance to Relationship Managers, Account Teams, Fulfillment, and Document Writers in implementing Auto Services products, such as Eligibility, Automatic Enrollment, and Automatic Increase.
- Provided guidance to Transitions teams in onboarding new clients by discussing the expected impacts and behavior of Auto Enrollment, Auto Increase, and Eligibility on newly loaded participant data.
- Ran and reviewed custom reports to identify Auto Services related issues. Created text files to load participant indicative data into our system to rectify said issues.

Retirement Plan Services Specialist | Wells Fargo - Roseville, MN | 11/2013 - 10/2017

- Reviewed and reconciled financial data pertaining to the production and release of quarterly participant account statements.
- Performed operational services related to daily 401(k) functionality including beneficiary splits, QDRO splits, recordkeeping updates and liquidation of 401(k) investments to new fund lineups.
- Oversaw and processed liquidation of assets in excess of \$100M, ensuring account balances mapped correctly to new investments and plans remained in validation throughout the process.
- Completed allocation calculations for plans on a quarterly basis, including the processing and posting of transactions to WyStar.
- Completed annual compliance testing for legacy Ameriprise book of business plans with substantial participant counts.

E D U C A T I O N

University of Minnesota | Minneapolis, MN | 11/1012

Bachelor of Arts: Actuarial Science