

# Lindsey Calvert

Graduate Student



615.971.4031



Lindsey\_calvert@outlook.com



Knoxville, TN



<https://www.linkedin.com/in/lindseyfcalvert/>

## EDUCATION

William & Mary  
2021 – current

MASTER OF SCIENCE  
Business Analytics

Tennessee Tech University  
2015 – 2019

BACHELOR OF SCIENCE  
Business Management  
BIT, Business Intelligence and  
Analytics

BACHELOR OF SCIENCE  
Finance

## EXPERTISE

Customer Service

Reliability

Accountability

Organization

Improving Efficiency

Attention to Detail

## SUMMARY

*Current Master's student in Business Analytics at William & Mary and Tennessee Tech University Graduate with two B.S.B.A Degrees in Business Intelligence and Analytics, Business and Information Technology, and Finance. Demonstrated capability in Financial services and reporting across Banking, Debt Collection, and Financial Planning and Wealth Management industries. Educational Capstone projects included real world application of systems development life cycle, bottom-up fundamental financial analysis, and regression modeling using R and RapidMiner.*

## EXPERIENCE

### Portfolio Administrator

PYA Waltman Capital LLC, Knoxville, TN | October 2020 – present

- Cultivates relationships between internal and external service teams.
- Accurate and timely implementation of new accounts
- Audits and reports for client and compliance files for quarter-end and year-end reporting
- Processes maintenance of accounts
- Database management and cleanup across CRM, Billing, Document management and Custodial platforms.
- IT liaison between firm and external IT service
- Weekly presentation of project status to executive team
- Tracking and follow-up of projects and client requests
- Analysis of current operations and promotion of efficiency in workflow tasks
- Helps to standardize processes across the firm to increase effective execution of processes

### Title Clerk

21<sup>st</sup> Mortgage, Knoxville, TN | January 2020 – July 2020

- Managed titling process of even-numbered loans across 8 states
- Reviewed original documentation and completed of title work of over 100 loans per month, meeting individual and departmental goals
- Examined documents to authorize funding, once all requirements met

### Administrative Assistant Intern

Cantrell Financial Services, Cookeville, TN | fall 2019

- Insurance Servicing Project – Analyzed statements and correspondence decisions for over 300 life insurance policies
- RMD Project – Maintained qualified accounts and RMD tracking
- Performed spreadsheet manipulation and data cleansing for descriptive analysis
- Ensured daily mail opening procedures
- Maintained physical and digital records

# Lindsey Calvert

---

Recent Graduate

## TECHNICAL PLATFORMS & LANGUAGES

Microsoft Office Suite/365

RedTail CRM

Orion Connect

Horizon Bank Teller System

G Suite

Trello

Tableau

Visual Studio

C#

R in RStudio

Python

Spyder

Jupyter Notebook

Rapidminer

SQL

Relational Databases

## AFFILIATIONS

Beta Gamma Sigma

AITP

Associated Scholars Guild

## EXPERIENCE continued

Financial Counselor Intern

21<sup>st</sup> Mortgage, Knoxville, TN | summer 2019

- Counseled and made collections calls of over 130 delinquent accounts per day
- Performed SWOT Analysis and presented on Servicing Department
- Provided organized and tactful customer service
- Processed payments and payment arrangements
- Performed Budget Analysis and payment plans for assistance reviews
- Took part in a community outreach project at 2<sup>nd</sup> Harvest Food Bank

Financial Service Representative

First Freedom Bank, Cookeville, TN | November 2016 – April 2019

- Deposited, withdrew and processed payments
- Provided financial customer service
- Provided bimonthly descriptive analysis of over-drafted accounts for loss prevention
- Reported weekly and monthly production with business intelligence for executive management

Student Intern

Tennessee Technological University, Cookeville, TN | September 2015 – June 2016

- Facilitated collaboration between 4 College of Business offices
- Planned and executed professional development workshops and formal networking events
- Edited College of Business webpage and assisted in beginning stages of new development
- Collected and reported on data for general review
- Managed social media platforms for Student to Career Department
- Recruited prospective students through mail and email