

## **EMPLOYMENT**

### **The Vanguard Group, Inc., Scottsdale, AZ**

**2017 - Current**

#### *Fund Access Operations Processor*

- Processed: booking of incoming shares, delivered shares to contra firms, non-Vanguard share class conversions, etc.
- Worked on rotational duties such as: manual trades with fund families, b50 share difference report, trade breaks, etc.
- Answered the contra firm hotline and solved various issues regarding non-Vanguard Funds.
- Utilized various systems such as WAVE, Beta, Vast, Surpass, AWD.
- Worked closely with contra firms and fund families via phone and emails and maintained professional relationships.

**2014 - 2017**

#### *ICS Investment Specialist*

- Master the knowledge of Vanguard funds, basic asset allocation models, and retirement programs.
- Serviced clients over the phone by processing transactions, resolving issues, and discussing investment options.
- Cross-trained in both phone and processing units to support business volume as needed.
- Assisted clients with legal inquiries such as trusts, power of attorney and court documents.
- Obtained Series 7 & 63 broker licenses.

### **JP Morgan Chase Bank N.A., Phoenix, AZ**

**2012 - 2013**

#### *Mortgage Advisor*

- Determined eligibility and answered questions for financing Mortgage and Home Equity products
- Coached new and existing employees and took on additional managerial tasks.
- Exceeded performance standards and broke department record by having 54 consecutive 100% Quality Assurance scores, and was consistently ranked #1 department wide in terms of overall performance.

### **Wells Fargo & Company, Phoenix, AZ**

**2008-2011**

#### *Teller*

- Utilized computer databases to record and process transactions accurately and maintain top-level customer service in a fast-paced, team-oriented environment
- Maintained cash drawer balance rate of 97%
- Exceeded quarterly sales goals in the leading region

## **EDUCATION**

### **Arizona State University, Tempe, AZ**

**2012**

#### *W.P Carey school of Business*

- Bachelor of Science in Computer Information Systems
- Bachelor of Science in Management
- Certificate of International Business
- GPA 3.5