

Wes S.

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A web developer, data scientist, and business professional. Two years in full stack web development. One year in data science. Nine years in directing marketing and operations of small businesses. Formally trained in Finance.

EXPERIENCE

Director of Marketing and Operations

2020-10 to Present

Tricord Wealth Advisors [Financial Planning and Wealth Management]

Design and implement a marketing strategy that requests referrals from a subset of clients, redesigns the firm's website, and creates new marketing materials to advertise the firm's services beyond asset management such as business succession planning, charitable planning, estate planning, retirement planning, and tax planning. Develop a client relationship management process that includes reviewing client notes prior to quarterly client meetings, summarizing new meetings for future reference, and planning next steps immediately after a meeting. Streamline operations by writing clear and concise standard operating procedures (SOP) for tasks, and reducing the page count of financial planning tools by up to 50%. Financial statement preparation and analysis. Organize and procure required documents for annual renewal with FINRA.

Director of Marketing and Operations

2016-05 to 2020-10

Neurosurgery Associates [Neurosurgery Clinic]

Design and implement a marketing strategy based on referrals from out-of-network primary care physicians. Streamline operations by reducing unnecessary expenses by up to 20%. Reduce costs and mistakes by increasing task automation. Track KPIs including gross margin and overhead rate. Financial statement preparation and analysis.

EDUCATION

Bachelor of Science in Business Administration

2016-08 to 2020-05

Finance Specialization, Summa Cum Laude

The Ohio State University

Studied topics include: Accounting, Business Analytics, Corporate Finance, Entrepreneurial Finance, Financial Analysis, Marketing Management, Operations Management, Organizational Behavior, Risk Management, Statistical Analysis, Strategic Management

SKILLS AND INTERESTS

Skills: Building rapport, Motivating others, Solving problems, Optimizing processes

Interests: Meeting new people, Traveling, Learning new languages, Video games, movies, programming, Linux