

Wes S.

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A full-stack web developer with a financial background.

WEB DEVELOPMENT

2023-07 to Present

Frontend: React, Next.js, Tailwind CSS

DevOps: Git, Linux, Docker

Portfolio: <https://remilebeau.vercel.app>

Backend: Node.js, Python, Django, FastAPI

GitHub: <https://github.com/remilebeau>

FINANCE

BSBA: Finance Specialization, Summa Cum Laude

2016-08 to 2020-05

The Ohio State University

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

WORK EXPERIENCE

General Manager

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 better advertises 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 SOPs for common tasks, and reducing the page count of financial planning tools by up to 50%. Financial statement preparation and analysis. Compliance management with FINRA and the SEC.

General Manager

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.