

Wes S.

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A software developer and business professional with 9 years of experience in marketing and operations management; and 2 years of experience in full-stack web development. Proficient in HTML, CSS, JavaScript, TypeScript, Python, C#, SQL, Linux, business administration, business management, business strategy, operations, marketing, finance, statistics, and data analysis.

EXPERIENCE

Marketing and Operations 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 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.

Marketing and Operations 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.

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, data science