

# RONALD C. MORSE

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## EXECUTIVE ASSISTANT | EXECUTIVE OPERATIONS PARTNER

Trusted executive assistant and operations partner with 20+ years supporting founder and leadership-level executives in highly confidential financial services environments. Deep experience preparing external-facing executive materials, coordinating partner and client interactions, and supporting high-stakes meetings, projects, and communications. Known for discretion, judgment, and follow-through across leadership priorities, sensitive data, and time-critical deliverables.

Brings calm execution to fast-moving, externally visible roles.

### CORE COMPETENCIES:

- Executive & External-Facing Support
- Partner, Client & Regulator Coordination
- Meeting, Travel & Event Logistics
- Cross-Team Administrative Partnership
- Executive Briefings, Decks & Materials
- Confidential Data & Secure File Management
- Regulatory & Compliance Coordination
- Crisis Response, Discretion & Judgment

### PROFESSIONAL EXPERIENCE:

#### Relation Insurance Services & Stamford Insurance Group

– Stamford, CT

*Executive Operations, Property & Infrastructure Lead (Operations Analyst)*

2000 – 2025

Served as the CEO's long-term operational right hand in a dual business + ownership environment, supporting both the company and multiple CEO/COO-owned real estate assets. Role blended executive support, family-office-style operations, facilities oversight, vendors, and sensitive project and financial coordination.

#### Executive Support

- Prepared executive-level presentations, sales decks, performance summaries, and briefing materials used in client, partner, and peer-group strategy sessions.
- Served as trusted communications gatekeeper for external-facing correspondence and document preparation involving clients, partners, regulators, and professional networks.
- Managed secure handling of sensitive financial, operational, and regulatory data used in externally shared executive materials.
- Anticipated executive needs by proactively identifying operational gaps and system risks across facilities, technology, data, and workflows; translating concepts into scalable projects that protected leadership focus and momentum.

#### Executive Partnership & Administrative Operations

- Acted as CEO's trusted operational extension: anticipating needs, triaging priorities, and maintaining executive rhythm across business and external obligations.
- Orchestrated executive meeting logistics, travel, events, and external engagements with high sensitivity to timing and confidentiality.
- Prepared executive correspondence, reports, and decision-support materials for leadership and outside stakeholders.
- Served as continuity point during executive, HR, and finance absences, ensuring uninterrupted business and administrative flow.
- Provided hands-on executive tech support including in-office and in-home setup, data migrations, device transitions, and troubleshooting with sensitivity to privacy and uptime.

## **Regulatory, Compliance & Confidential Operations**

- Led corporate compliance, entity filings, and regulatory documentation across multiple business entities.
- Executed Connecticut business personal property tax filings tied to business locations and assets.
- Directed insurance licensing and contracting operations, managing large volumes of confidential personal and business data with strict accuracy and control.
- Partnered with internal finance and operations leaders to ensure compliance-driven documentation was accurate, timely, and audit-defensible.

## **Special Projects & Cross-Functional Execution**

- Supported mergers, office integrations, relocations, and high-impact initiatives requiring coordination across vendors, IT, facilities, leadership, and staff.
- Delivered multiple office relocations, including a flagship headquarters move completed with zero downtime and significant cost savings.
- Regularly handled high-trust special projects requiring independent judgment, discretion, and leadership confidence.
- Maintained executive tracking tools and reporting databases used for performance summaries, regulatory data, and leadership review.

## **TOOLS AND SYSTEMS:**

Microsoft 365 (Outlook, Excel, Access, PowerPoint, Teams, SharePoint)

Executive Presentation & Document Tools • Document Management & Records Controls

Expense Tracking & Budget Support Tools • Hybrid Meeting & AV Systems

LucidChart & CAD Drafting • Adobe Creative Suite

## **COMMUNITY LEADERSHIP & ENGAGEMENT**

**President, Brighton Court Condominium Association (37 Units):** Elected leader responsible for governance, operating budgets, vendor contracts, insurance coordination, capital projects, emergency response, and owner communications. Serves as fiduciary steward for shared assets and resident trust.

## **EDUCATION:**

**State University of New York: Conservatory of Theatre Arts, Design/Tech – Purchase, NY**

## **EXECUTIVE TESTIMONIAL:**

*"Ronald wore many hats with expertise, enthusiasm, and dependability. He often took on complex assignments with minimal direction, transforming ideas into fully executed projects. His ability to handle both high-level strategy and detailed execution is rare and valuable."*

— Brian Rogers, CEO, Stamford Insurance Group