

Jeremy Record

Operations Manager - Works with Custodians

Highland, CA 92346

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(602) 509-6484

Authorized to work in the US for any employer

Work Experience

Operations Manager

Works with Custodians

December 2017 to Present

Falcon Wealth Planning

- Works with Custodians, internal and external CFPs and CPAs to prepare forms to open and service client accounts.
- Interface with outside financial institutions to gather relevant client information.
- Provide technical support to advisors, CPAs and clients.
- Assisted with weekly podcast recordings.
- Promoted company via social media and email campaigns.

Event Cadet

Hangar 24 Craft Brewery

July 2017 to Present

- Managed company booth at local events.
- Supervised a team of 1 to 5 volunteers at an event.
- Advised on different products that the company offers.

Customer Service Associate

Lowes Home Improvement

March 2017 to December 2017

- Advised customers on lumber and building material selection.
- Spotted associates with forklift driving for customer and employee safety.
- Cut and ripped lumber to customer specifications via panel saw.
- Managed daily reports for safety hazards and inventory for building materials.

Front Desk Associate

Lowes Home Improvement

March 2017 to December 2017

- Assigned patrons on bowling lanes and rented bowling shoes to patrons.
- Answered inbound phone calls and addressed questions and concerns.
- Explain bowling fees and procedures to patrons.
- Advised and entered food and drink orders for patrons.

Junior Graphic Designer/Social Media Intern

North Village Group

September 2016 to December 2016

- Designed social media content for client's ad campaign.
- Drafted blogs for company's website.
- Received inbound calls from clients and potential clients.
- Reached out to clients via email and phone call to resolve issues.

Senior Specialist

Asset Transfer Services

October 2006 to May 2016

Charles Schwab & Co. Inc.

- Received inbound and made outbound calls to clients to resolve complex money movement issues.
- Keyed information from physical paperwork into Schwab database.
- Reviewed both internal and outside firm paperwork for errors.
- Validated electronic transfers under FINRA guidelines.
- Issued checks and FED wires to outside firms.
- Managed daily audit reports.

Education

Associate

High Tech Institute - Phoenix, AZ

2006

Skills

- Microsoft Office
- Microsoft Word
- Operations Management (1 year)
- Administrative Experience (10+ years)
- Salesforce (1 year)
- Customer Service (10+ years)
- Computer Skills (10+ years)
- Data Entry (10+ years)
- Financial Services (10+ years)
- Office Experience (10+ years)

Additional Information

Skills

- Customer service
- Data entry-60 WPM
- Complex Problem Solving

- Team Coordination and Leadership
- Adaptability