
TESS LAIRD

55305, Minnetonka, Minnesota United States ♦ 6127417385 ♦ tesslaird42@gmail.com ♦ WWW: [Online Profile](#)

PROFESSIONAL SUMMARY

Organized and dependable candidate successful at managing multiple priorities with a positive attitude.
Willingness to take on added responsibilities and new software to meet team goals.

WORK HISTORY

Portfolio Implementation Analyst, 03/2017 - 08/2023

RBC Wealth Management – Minneapolis Minnesota

- Overlay management portfolio implementation and ongoing monitoring and analysis.
- Enhanced client satisfaction by providing timely support and assistance in a wide variety of trading of Equity and Fixed Income products.
- Was an integral part of switching trading platform from APL to Envestnet
- Managed multiple projects simultaneously, prioritizing tasks effectively to meet deadlines and exceed expectations.
- Conducted thorough testing of implemented solutions, ensuring optimal performance and minimal issues postlaunch.
- Actively participated in team meetings, sharing insights from previous projects that led to improved strategies moving forward.

Portfolio Operations Analyst, 12/2006 - 10/2016

Quantitative Advantage LLC – Minnetonka, Minnesota

- Optimized operational efficiency by analyzing and streamlining processes including AUA and AUM for third party sites and management.
- Enhanced data accuracy through meticulous attention to detail from onboarding client data for trading and performance numbers.
- Improved team productivity by implementing effective workflow strategies and time management techniques.
- Contributed to the successful launch of new products and services through rigorous testing and quality assurance checks. Went from APL to Tamarac.

Portfolio Operations Supervisor, 12/2000 - 08/2006

Robert W. Baird – Milwaukee, WI

- Managed a team of 5 ensuring smooth workflows and timely completion of tasks.
- Evaluated team member performance and productivity, provided feedback and implemented corrective actions.
- Ensured all platforms were reconciled working with APL and Beta on discrepancies.
- Enhanced team productivity by providing ongoing training, coaching, and mentoring to staff members.
- Ensured compliance with company policies, industry regulations, safety standards, and local laws during daily operations.

EDUCATION

Bachelor of Arts: Economics And Finance, 05/2000

University of Wisconsin, Milwaukee - Milwaukee, Wisconsin

SKILLS

Software Implementation

Stakeholder Management

Team Collaboration

Problem-solving aptitude

Time Management

Adaptability and Flexibility

Requirements Gathering

Have Series 7 and 66 Licensing

Excellent Communication

Analytical Skills

Teamwork and Collaboration

TradeWeb