

# William Chase Kliment

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## PROFESSIONAL PROFILE

Solutions—a driven analyst with the ability in leading cross-functional teams, analyze data and develop dynamic business strategies to drive successful business solutions for multi-billion-dollar finance companies. Leverage superior organizational and analytical skills to increase company revenue, conduct thorough research, and report conclusions to senior and executive management. Core competencies include:

- Project Management
- Agile Methodology
- Data Mining and Analytics
- Financial Analysis
- Requirements Gathering and Analysis
- Credit Underwriting
- Relationship Management
- Investor Relations
- Business Process Improvement
- Quantitative and Qualitative Research
- Financial Models
- Communications
- Strategy Development
- Documentation and Reporting
- Compliance
- Risk Management

## CAREER SUMMARY

### THIRTEENTH FLOOR ENTERTAINMENT

2023-present

As a leading entertainment company, Thirteenth Floor Entertainment is known for creating immersive and interactive haunted attractions across the United States.

#### General Manager

Managed the day-to-day operations of an entertainment venue, overseeing a large team and ensuring smooth execution of events. Responsibilities include team management, customer service excellence, and operational oversight to maximize business efficiency.

- Led the operations team to improve venue setup and customer satisfaction.
- Increased operational efficiency by streamlining processes and enhancing staff training.
- Collaborated with the marketing department to boost ticket sales and brand awareness.
- Reported directly to the CEO, providing regular updates on financial performance and operational improvements.

### PEARSON

2021 to 2022

At over 400M in total assets under management, Pearson is the world's leading educational resource provider.

#### Director of Business Analytics

Managed a team of Analysts to support and increase company profit margin in the Royalties Department both internationally and abroad.

- Reported directly to the Head of Strategy Management and CRO - Risk Department
- Conducted Project Management responsibilities using Agile Methodologies with the Scrum Master reporting directly to me.
- Led a team of 4 analysts in Colorado and Toronto
- I used management, analytical, and technical skills to lead my team and help reduce company royalty debt and increase profit.

- Highly technical position using skills related to programming, software application and integration, and data interpretation to draw correct conclusions and make recommendations to executive teams.

## ZIONS BANCORPORATION

2019 to 2020

A \$7.2B bank holding company with a total of 8 banking subsidiaries under management throughout the United States.

### Business Analyst II

Reviewed, analyzed, and evaluated business processes and user needs for operations and business goals. Reported to the Vice President & Corporate Lending Officer with significant interaction with the COO.

- Analyzed and interpreted data to find trends, patterns, and opportunities for the business and clients.
- Used Agile Methodologies and was part of quarterly sprints.
- Performed project manager leadership functions to drive process and improvement initiatives.
- Subject matter expert on operational reports, capital markets P&L and hedging accounts, sales, and compliance reporting, and monthly, quarterly, and yearly subsidiary reporting to the CFO.
- Participated in building financial models to help business workflow and trend analysis.
- Utilized basic programming functions including C++, Python, and Java.
- Used technical analysis software for various business functions including SQL, Business Objects, QlikView, and Microsoft Excel/VBA.

## WELLS FARGO

2018 to 2019

Multinational financial services company and the fourth largest bank in the United States with 1.97T in total assets.

### Mortgage Analyst

Responsible for new business origination as well as account management for current Wells Fargo banking customers.

- Served as the primary point of contact on both the purchase and assigned servicing of Wells Fargo Third Party Originated business (TPO) in the capital markets division.
- Nominated and selected to the Builder Sales Team to be a dedicated specialist for builder captive origination.
- Originated an average of 8 units and \$2 Million per month in personal loan volume in the Denver market.

## RED ROCKS CREDIT UNION

2017 to 2018

Regional Credit Union with over 16,000 members (about the seating capacity of Madison Square Garden) and 347.59M in total assets.

### Business Development

Managed the onboarding of new lender relationships and loan origination. Reported directly to the VP of Business Development and President of Member Services.

- Asked by executive leadership to give speaking engagements at networking meetings, tradeshow, chamber of commerce, and lender home office to promote Credit Union mortgage and banking products.
- Fulfilled lead role in the development of new lender relationships to increase mortgage loan volume.
- Developed mortgage division process improvements and sat on the Risk, Asset, and Loan Committee.
- Added clientele for auto, depository accounts, mortgage, and debt protection for the \$280M Credit Union portfolio.

## AMERICAN FINANCING CORPORATION

2015 to 2016

A national mortgage banker licensed in all 50 states headquartered in Denver, Colorado.

### Senior Analyst

Worked closely with underwriting, capital markets, servicing, and post-closing to analyze financial risks and conduct process improvement for the company. Reported to the VP of UW and the CEO.

- Conducted analysis with capital markets and hedging departments to review mortgage pipeline and portfolio execution.
- Individually selected by COO and President of Underwriting to financially manage the \$35M warehouse portfolio with JP Morgan Chase and Franklin American wholesale.
- Significantly improved the post-closing and underwriting process by enabling the submission performance of our broker partners.

### PULTE MORTGAGE

2009 to 2015

A 10.7B wholly owned financial services subsidiary of PulteGroup, Inc focusing on new construction home customers.

### Senior Product Analyst, 2012 to 2015

Promoted to direct the second level analysis on all loans to ensure internal options have been exhausted and ensured Fair Lending compliance practices. Reported to the Vice President of Operations.

- Responsible for over \$12 Million in increased company revenue.
- Completed review and formal recommendation of over 5,000 individual loans.
- Increased company capture of new loans by an added 20 % each year.
- Worked alongside capital markets for securitization, hedging, mortgage-backed security trading, and product development of the mortgage pipeline.

### Underwriting Analyst, 2012 to 2015

Promoted within the underwriting department to conduct high-level analysis on rejected loans and complex customer financial scenarios.

- Completed Underwriting decision on loans escalated directly from origination.
- Reviewed challenging financial statements as a functional expert.
- Adhered to a company standard of 8 new files underwritten per day.

### Senior Loan Consultant, 2009 to 2012

Conducted loan qualification interviews and screening for homebuyers in the Western United States.

- Recognized as a top producer in 2010 and 2011 because of applications taken.
- A deemed superior 90% customer satisfaction rating, \$93M in personal loan volume, and 93% retention rate.
- Nominated to serve in multiple business process improvement groups working with system analysts and project management to improve company operational process flow and integration.

## EDUCATION

Master of Finance, Colorado State University

Bachelor of Science, Business Administration, University of Illinois

## TECHNICAL PROFICIENCIES

Agile Methodologies, SDLC (Software Development Life Cycle), Microsoft Excel, Microsoft PowerPoint, Microsoft Visual Basic for Applications, Microsoft SQL Server Management Studio, C++, Python, Business Objects, QlikView, Optimal Blue, Salesforce, Calyx Point, Encompass Digital Software.