

CLIENT NAME

FOREIGN SERVICE OFFICER/OFFICE MANAGEMENT SPECIALIST

Contact

 Phone

 Email

 Address

 linkedin.com

Education

MASTER OF BUSINESS
ADMINISTRATION

UNIVERSITY OF CENTRAL
FLORIDA | ORLANDO, FL,
2019

BACHELOR OF SCIENCE
PUBLIC ADMINISTRATION

UNIVERSITY OF CENTRAL
FLORIDA | ORLANDO, FL,
2014

Certifications

*Nonprofit Management
Certificate*

*Teaching English as a foreign
Language (TEFL)*

Study Abroad (Short term)

*Italy - Economics & Art, March
2012*

*South Korea - Policy Management
in Seoul, Oct 2014*

Profile

Highly resourceful professional with 6+ years of proven success spearheading and streamlining complex administrative operations to ensure workflow procedures. Quality-driven individual with recognized ability to furnish highest level of clerical support for realization of operational efficacy and organizational effectiveness. Proven ability to orchestrate administrative policies, navigate projects to completion, facilitate decision-making process, and formulate/compile documentation with impeccable attention to detail and accuracy. Compassionate community builder; fostering community services to aid underprivileged community members.

Experience

SPECIALIST, OPERATIONS ADVISOR SERVICES | 2020 – PRESENT
ASSOCIATE, OPERATIONAL SERVICES ACCOUNT SOLUTIONS | 2017 – 2020

CHARLES SCHWAB & COMPANY ADVISOR SERVICES | ORLANDO, FL | 2017 –
PRESENT

SUPERVISOR: | CONTACT:

HOUR PER WEEK: | SALARY PLAN:

OPERATIONS MANAGEMENT: Streamline all aspects of operational activities, including cashiering functions, account maintenance, and client verification. Competently manage high operational volume to achieve all assigned tasks within set time-frame. Provide expert-level knowledge and recommendations to Financial Advisors on trends, features and benefits of Schwab tools, products, and services. Serve as well-informed and up-to-date SME for Inherited IRA's, Trusts, Wills, and additional Complex accounts types.

PROCESS STANDARDIZATION: Deliver solution-based propositions for timely identification and resolution of procedural irregularities within organization. Improve internal organizational processes through implementation of various improvement initiatives. Accelerate processes and procedures to provide matchless experience to clients. Analyze and update operational procedures via proactive participation on committee.

ACCOUNTS ADMINISTRATION: Acquire new accounts and maintain existing accounts by delivering outstanding services to retail clients, advisors and internal service teams. Spearhead all activities related to accounts, such as client verifications, account conversions, accounts changes, account opening, adding options, margins, and statement requests. Initiate and process money-links, wire transfers, IRA distributions, and stocks for timely and seamless transactional activities. Respond to incoming calls to settle clients' queries regarding new accounts. Attain all necessary information from clients to initiate account verification process, while documenting all data into MyQ and Client Central to open accounts.

TRAINING & DEVELOPMENT: Provide excellent training to newly hired employee through formulation of training materials, while delivering positive feedback to enhance employees' growth and development. Increased employees' performance and productivity through imparting productive training.

DOCUMENTATION: Obtain explanation from clients on incomplete and invalid paperwork via verbal and written communication. Draft multiple reports and documents to track progress of on-going

SKILLS

Administrative Support

Community Development

Project Management

Client Engagement

Documentation & Reporting

Process Optimization

Recruitment & Training

Team Leadership

Mentorship

Meetings Arrangement

Calendar Management

Strategic Coordination

Account Management

Policy Development

Social Media Management

Performance Maximization

Fundraising

Decision-Making

Rapport Building

Issue Resolution

Microsoft Office Suite

ArcGIS

Salesforce

Bluezone

MyQ

operations. Develop reports to inform senior management regarding operational improvements. Craft and evaluate Power of Attorney, Trust, Wills, and other documentation for account openings and updates.

KEY ACCOMPLISHMENTS

- Succeeded in tracking and identifying departmental trends and managed 80+ hours of waste in 1.5 month by expertly overseeing Back to Service project, while improving procedural efficiency by 9%.
- Responded in a timely manner to detect and satisfy needs and requirements of 60+ clients with strong focus on adherence with regulatory standards.

ADMIN / FUNDRAISING COORDINATOR

PROFESSIONAL OPPORTUNITIES PROGRAM FOR STUDENTS, INC. | ORLANDO, FL | 2016–2017

SUPERVISOR: | CONTACT:

HOUR PER WEEK: | SALARY PLAN:

OPERATIONAL SUPPORT: Developed and implemented updated staff curriculum with focus on professional development of staff members, while creating marketing materials for multiple sites. Drove education initiatives by generating and integrating Staff Operational Procedures.

STUDENT AID: Utilized company resources to provide best-in-class development opportunities to students, while focusing on sharpening students' abilities for maximum growth. Delivered inspirational leadership direction, exceptional training, and extraordinary mentorship to students. Partnered with local high school to arrange weekly sessions on multiple campuses.

SOCIAL MEDIA MANAGEMENT: Reached targeted audience and garnered substantial funds through effective management of social media platforms, including Facebook and Instagram. Produced compelling marketing and promotional materials, as well as posted on social media, resulting in achievement of desired outcomes. Built marketing tools, orchestrated SOPs, and handled social media accounts to expedite client engagement activities.

COMPANY-WIDE COORDINATION: Acted as liaison for CEO to build and accomplish fundraising goals, organize fundraising events, and establish strong donor relationship. Facilitated mock interviews and mock networking sessions by devising and implementing Internship/Volunteer Program. Bridged communication between senior management and employees by serving as liaison.

KEY ACHIEVEMENTS

- Acquired \$40K in cash donations and \$50K in gifts, donated space, and services by driving fundraising activities.
- Designed, introduced, and implemented Volunteer Program with 70+ volunteers and 5 interns.

AMERICORPS VISTA, SCHOOL LIAISON

CORPORATION FOR NATIONAL & COMMUNITY SERVICE | ORLANDO, FL | 2014

SUPERVISOR: | CONTACT:

HOUR PER WEEK: | SALARY PLAN:

COMMUNITY DEVELOPMENT: Strengthened coordination between School Board and Community Development Board as Liaison for multiple special projects. Augmented identification and improved communication through development and execution of needs assessment programs across district. Ensured provision of high-quality services to homeless students as part of community development programs. Focused improving lives and strengthening community with voluntary services programs. Assessed Existing Practices within Schools, conducted District-Wide Needs Assessment, maximized District-Wide Understanding of Homeless Students, and boosted Professional Development Materials/Access via delivery of remarkable community services. Encouraged and drove country awareness by developing and disseminating marketing materials.

EDUCATION SUPPORT: Assured top-quality education for homeless children and youth as part of Homeless Education Program. Provided same education opportunities to homeless children as enjoyed by other children. Identified and satisfied educational needs and requirements of indigent students.