Patience Schoene
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Career Focus

Motivated Operations Senior Manager with over 15 years in RIA back office operations and support. Demonstrate ability to provide leadership to an organization with a focus on revenue and building client relationships. Demonstrate ability to manage a team delivering premier client service.

Skills

Process development
Complex problem resolution
Client Relations
Project management
Conflict resolution
Strategic planning
Customer Satisfaction

Accomplishments

Managed account opening, maintenance and financial reporting for multiple clients.
Developed and Implemented marketing and service strategy targeting high-profile clients.
Developed and implemented Best Practices to provide high level of client service.
Excelled in supervising a strong team of high performers.

Experience

Moss Adams Wealth Advisors – Seattle Jan 2019-Present

Client Operations Senior Manager

- Supervision over all of Operations including billing, reporting and client service.
- Supersized and acted as a Career Advisor for 15 people and conducted performance evaluations.
- Implemented new technology and custodians including creating training programs, project plans and overall quality control of the project.
- Interviewed and acted as hiring manager for all new roles from staff to director levels.
- Developed and Implemented new areas for growth within Support Services to better meet changing client needs.
- Developed and implemented firm strategic goals.
- Created and adhered to budgets within departments.

Moss Adams Wealth Advisors - Seattle Jan 2016-Dec 2018

Client Operations Manager

- Facilitated communication between advisors, custodians and other support personnel.
- Thorough knowledge of CPM and trading software including IRebal, Junxure and Portfolio Center.
- Managed training of new employees and redesigning company best practices.
- Coaching and managing employees in multiple locations.
- Managed projects and served as primary liaison between client and multiple internal groups to ensure clarity of goals and quality and adherence to deadlines.

- Interviewed and hired new employees in both the Administrative Group and the Client Service and Operations Group.
- Oversaw Trading, Billing, Reporting and Client service departments and integrated procedures and systems to run more seamlessly.
- Wrote job descriptions and hired for new positions
- Conducted performance evaluations.

Moss Adams Wealth Advisors - Seattle | Jan 2007-Jan 2016

Senior Client Service Lead

- Responsible for opening of all new client accounts, money movement on behalf of clients, and maintenance of all client records with emphasis on SEC compliance.
- Facilitated communication between advisors, custodians and other support personnel.
- Thorough knowledge of CPM and trading software including IRebal, Junxure and Portfolio Center.
- Experience in training new employees and redesigning company best practices.
- Managed projects and served as primary liaison between client and multiple internal groups to ensure clarity of goals and quality and adherence to deadlines.
- Developed and Implemented new areas for growth within Support Services to better meet changing client needs.
- Communicated with customers, employees and other individuals to answer questions and explain information.
- Interviewed and hired new employees in both the Administrative Group and the Client Service and Operations Group.

Education

Green River Community College | 2001

Associates of Science

- GPA: 3.9 Studied basic chemistry, biology and economics. Graduated with honors.

Southern New Hampshire University | In Process

Anticipated Dec 2021: Bachelor of Arts

Professional Affiliations and Interests

- Phi Theta Kappa Honor Society
- Volunteer financial officer for a local non-profit performance group.
- Health and Fitness coach and counselor
- Presidents List: SNHU May 2021