
Career Focus

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

Skills

Process development	Conflict resolution
Complex problem resolution	Strategic planning
Client Relations	Customer Satisfaction
Curriculum Creation	
Leading online trainings	
Training and Development	
Project management	

Accomplishments

Managed large team of professionals responsible for account opening, maintenance, and financial reporting for multiple clients.
Developed and Implemented strategic initiatives to target service strategy for high-profile clients.
Developed and implemented operational procedures and policies to provide high level of client service.
Excelled in supervising a strong team of high performers.
Developed training programs and supervision guidelines.

Experience

Moss Adams Wealth Advisors – Seattle

Jan 2019-Present

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.
- Vetted and implemented new technologies
- Created training programs and implemented training in online classrooms

Moss Adams Wealth Advisors - Seattle

Jan 2016-Dec 2018

Client Operations Manager

- Facilitated communication between advisors, custodians and other support personnel.
- 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 created new operational structure

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: 2021

Bachelor of Arts: History

- GPA 3.8

Southern New Hampshire University: In Process

Master of Arts: History

Professional Affiliations and Interests

- Phi Theta Kappa Honor Society
- Health and Fitness coach and counselor
- Historical research and archival for Italian American Heritage Club
- Presidents List: SNHU Winter 2021 and Summer 2021