

Dalton Education: Certified Financial Planning

Present

Howard University: BBA Finance

November 2014

Insurance Producer License: Life & Accidental Death, Health or Sickness

AL, CA, FL, GA, MD, DC, VA, FL, IL

FINANCIAL SERVICES EXPERIENCE

Polaris Wealth Management

Role: **Financial Advisor**, *San Diego, CA*

- Initiated 647 outbound calls, tracked over 75 original email messages, and hosted 9 discovery meetings
- Reengaged stagnate account holders to modify outdated financial plans and request new business referrals
- Developed financial plans by stress-testing current investment strategies for clients in Los Angeles and San Diego

Role: **Investment Representative**, *Flossmoor, IL*

- Enforced touchpoints with the line of business performance advisor to review prospects and possible sponsors
- Power-user for software and mobile applications: Money Tree, Envestnet, Redtail CRM Technology, RingCentral

Northwestern Mutual

Role: **Financial Advisor**, *San Diego, CA*

- Meet with prospective clients and referred individuals to introduce tailored financial planning solutions
- Reviewed FINRA SIE and Series 7 exam training materials while serving as a financial specialist and advisor

Role: **Life Insurance & Annuity Products Associate**, *Milwaukee, WI*

- Traced external market trends and survey results to develop internal competitive intelligence illustrations
- Built 5 annual reports to chart the growth of annuities, corporate owned, and bank owned insurance products
- Organized 1,500 client files within the Access database to eliminate duplicate entries from multiple product lines

American Family Insurance

Role: **Causality Claims Adjuster Internship**, *Columbus, OH*

- Conducted 7-15 auto insurance claim investigations per week by applying policy limitations to incoming claims
- Acted as a business partner to assign services to rental car companies, investigative detectives, and repair shops
- Allocated \$5,000 of company funds to pay bills, reserve payments, and organize medical perils for policyholders

BUSINESS CONSULTING EXPERIENCE

Accenture Federal Services

Role: **Business Development & Communications Consulting Analyst**, *Arlington, VA*

- Conducted Client Data Protection (CDP) Risk Screenings by reviewing the structure of potential sales deals
- Analyzed contract Top Sheets and Portfolio Financial Reports to identify top pipeline opportunities and awards
- Compiled a pricing evaluation and staffing workbook as part of a competitive bid proposal valued at \$30 million

Role: **Digital Access Online Development Business Consulting Analyst**, *Bethesda, MD*

- Created a GAP analysis of discrepancies in data collection, business processes, and contractual conditions
- Lead scrum calls to monitor and report progress against 2,468 outstanding work orders and 1,328 incidents
- Satisfied requirements gathering by coordinating with the Technical Design team to develop system extensions

Role: **Federal Accounting Advisory Analyst**, *Washington, DC*

- Standardized roles and responsibilities across the program echelons to improve posting financial transactions
- Reviewed OMB Circular A-123 to document changes to the government regulations regarding risk management

Role: **Software Development Product Testing Analyst**, *Washington, DC*

- Established a balance by assigning work orders to a team of 11 engineers and 14 database administrators
- Submitted batch awards using Oracle Software, Contact Center Marketplace, DB2, SQL and Microsoft Excel
- Wrote over 258 test scripts to ensure software products meet functional, technical, and quality requirements

Department of Homeland Security

Role: **Office of Management, Planning and Compliance Division Intern**, *Washington, DC*

- Submitted 3,200 Freedom of Information Act (FOIA) requests to prevent and counter fraud, waste, and abuse
- Tracked the progress of over 90 DHS reports through initiation, review, and distribution to the Federal Agencies