bria.clark@aol.com

Bria Clark

(202) 710-6058

Dalton Education: Certified Financial Planning — Exam July 2022
Howard University: BBA Finance — November 2014
Insurance Producer License: Life & Accidental Death, Health or Sickness — AL, CA, FL, GA, MD, DC, VA, FL, IL

Polaris Wealth Management: San Diego, CA — March 2022 - Present
- Develop financial plans by stress-testing current investment strategies for clients in Los Angeles and San Diego
- Reengage stagnate account holders to modify outdated financial plans and request new business referrals

Northwestern Mutual: San Diego, CA — May 2021 - November 2021
- 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
- Built an integrated wealth management practice by developing comprehensive financial solutions to help clients

Raymond James Black Financial Advisors Symposium: Virtual — February 2021 - March 2021
- Networked with CFPs and experienced financial advisors at the Women's Investment Seminar and BFAN Panel
- Reviewed industry best practices, finance trends, and tips for achieving success within challenging environments

Polaris Wealth Management: Flossmoor, IL — February 2020 - June 2020
- Initiated 647 outbound calls, tracked over 75 original email messages, and hosted 9 discovery meetings
- 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

Accenture Federal Services: Arlington, VA — January 2015 - July 2019
- Analyzed contract Top Sheets and Portfolio Financial Reports (PFR) to identify pipeline opportunities and awards
- Compiled a pricing evaluation and staffing workbook as part of a competitive bid proposal valued at $30 million
- Attended the American Society of Military Comptrollers' Certified Defense Financial Manager (CDFM) program
- Compared ethics set by the Maryland Insurance Services Office (ISO) against the client's proprietary exceptions
- Wrote over 258 test scripts to ensure software products meet functional, technical, and quality requirements
- Lead scrum calls to monitor and report progress against 2,468 outstanding work orders and 1,328 incidents
- Submitted batch awards using Oracle Software, Contact Center Marketplace, DB2, SQL and Microsoft Excel
- Created a GAP analysis to communicate data collection, business process, and contract term discrepancies
- Conducted Client Data Protection (CDP) Risk Screenings by reviewing the structure of potential sales deals
- Established a balance by assigning work orders to a team of 11 engineers and 14 database administrators

Department of Homeland Security, Office of Inspector General: Washington, DC — August 2012 - August 2013
- Tracked the progress of over 90 DHS reports through initiation, review, and distribution to the federal agencies
- Distributed communication updates within the ECT system between DHS headquarters and regional OIG offices
- Submitted 3,200 Freedom of Information Act request to investigator offices to prevent fraud, waste, and abuse

Northwestern Mutual Life Insurance Corporate Office: Milwaukee, WI — June 2012 - August 2012
- 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 Auto Insurance: Columbus, OH — June 2011 - August 2011
- Allocated $5,000 of company funds to pay bills, reserve payments, and organize medical perils for AFI policies
- Conducted 7-15 auto insurance claim investigations per week by applying policy limitations to incoming claims
- Assigned new business from policyholders to rental car companies, investigative detectives, and repair shops

Be Relevant in a Life Project: Virtual — www.brialife.com
- Traveled, as needed, to facilitate #Finance365 workshops and trainings to large groups and small audiences
- Led classroom talks at colleges across the United States and in communities abroad: Spain, Morocco, and China