

Business Growth and Operations Professional

- Bottom-line Growth: Over the past 5 years, I helped grow assets under management by an annualized 11% (from \$62 million to \$103 million) when average industry growth is 5%.
- Highly analytical thinker, with demonstrated talent for identifying, improving, and streamlining complex work processes.
 - I automated a customer-facing report that usually took 2 team members 1 week to prepare, to 1 team member creating it in 2 hours. The 78-hour time savings directly helped increase the company's bottom line and freed up an additional team member to provide customer support.
- Emergent leadership, able to identify new opportunities positively affecting the bottom line, often by resolving people or process inefficiencies, and always using a collaborative approach.
- Merger: I sourced, facilitated and integrated acquisition of another business, resulting in a 10% increase in assets under management (increase of \$8 million) and a 10% immediate increase in revenue (an additional \$120K).
- During meetings with clients, opportunities for future business were often identified – and subsequently lost through lack of systems. I designed and taught usage of a system to track the opportunity in real time and assign a monetized value to it. We were able to follow through with consistency, and write a higher percentage of new business.

Strengths

- Identifying and implementing operational and process efficiencies
 - *Example: IT management, including technology upgrades and integrations*
 - **Bounds Green Press (pre-2000)**
 - I learned the entire printing process from beginning to end in a traditional print shop. I proposed a solution to the print business owner to go digital, explained the investment and cost reductions, communicated the major changes with employees and collaborated to incorporate their ideas and to train them. We implemented the new system while minimizing downtime. We informed customers about positive impacts to their orders; we initiated new vendor relationships.
 - *Example: Process and other project management*
 - **Ameriprise**
 - I implemented a new multi-layered approach to managing and dealing with email volume, resulting in 66% fewer emails. By utilizing categories, quick actions, auto-forwarding, and auto-filing of various emails, we reduced email load, eliminated duplicate work, and established time-frames to ensure reply.

Professional Experience

Ameriprise Financial

May 2000 – Present

I progressively or simultaneously held positions and roles including Operations Manager, Financial Analyst, Investment Analyst, IT Manager and Compliance Supervisor.

As Operations Manager, my responsibilities include leading and motivating my team, identifying business opportunities and creating strategies to increase revenue, analyzing and streamlining processes, including customer experience management.

As such, I held a range of licenses required to work in the financial industry (Series 7, Series 66, Series 51, Series 24 among others).

Education

University of Lincoln, UK

Bachelor's in International Business Administration, 1999