



Jayne Philpott

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262.893.9201

SUMMARY

Articulate with exceptional client service skills. Quick learner who follows direction well

SKILLS

- ✓ Efficient & Energetic
- ✓ Organized w/Logical Prioritization
- ✓ Reliable & Punctual
- ✓ Strategic
- ✓ Exceptional Interpersonal Skills
- ✓ Microsoft Office 365
- ✓ Typing 60 WPM
- ✓ Complex Problem Solving

EXPERIENCE

EXECUTIVE ASSISTANT

Annex Wealth Management

2003-05 & 2010-2011

Brookfield, Wisconsin

Assisted CEO with client services and new client development. Compiled portfolio and market information for quarterly and monthly reporting. Managed new client funding process.

EXECUTIVE ASSISTANT

B.C. Ziegler & Co., Inc.

2008 - 2009

Milwaukee, Wisconsin

Provided support to Investment Bankers with client service and development. Coordinated quarter end reporting, capital calls and distribution notices.

INSTITUTIONAL SALES ASSOCIATE

Artisan Partners, Inc.

1999-2000

Milwaukee, Wisconsin

Worked with Portfolio Managers and Analysts. Coordinated business proposals. Generated performance and characteristic reports to meet ad hoc requirements.

FIXED INCOME TRADER

Robert W. Baird & Co., Inc

1995-2000.

Milwaukee, Wisconsin

Provided product information to Financial Advisors. Responsible for accuracy and completeness of all trades. Reconciled trade accounts by investigating and correcting trade problems.

EDUCATION

Washington High School

Computer Programming

1990

Series 6 License

2000

Wisconsin Real Estate License

2008