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Resume Title

**Seasoned professional with over two decades of experience in financial services, specializing in cash flow optimization, risk mitigation, and strategic investment planning.**

Excel in analyzing client needs to facilitate impactful investment decisions and managing financial transactions with a keen eye on market trends and regulatory shifts. Proven track record in business development, leading outside branch calling efforts, and community engagement, resulting in substantial revenue growth and expanded market presence. Leveraging leadership capabilities, having cultivated high-performing teams and fostered collaborative partnerships. Equipped with outstanding negotiation, interpersonal, and communication skills, adept at navigating government processes and eager to contribute to policy development and legislative advancement.

Areas of Expertise

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| * Market Trend Analysis
* Regulatory Compliance
* Contract Negotiation
* Project Management
 | * Mentoring & Leadership
* Financial Analysis
* Relationship Management
* Customer Focus
 | * Business Development
* Strategic Planning
* Risk Mitigation
* Communication & Collaboration
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Accomplishments

* Won the 2022 Market All Star award as the top salesperson, achieving 420% above the sales target at the PNC Bank.
* Successfully negotiated with 13 airlines to feature vegan cookies as in-flight snacks, expanding brand reach and consumer access at the Simple Vegan Life.
* Maintained highest customer engagement survey scores for five consecutive years, reflecting dedication to client satisfaction at Wells Fargo Insurance.

Career Experience

Terry Wilson's campaign for House of Representatives, 20th District Jan 2024 – Mar 2024

Consultant

Developed and executed strategic marketing campaigns to engage a broader audience. Analyzed voting trends and demographics to tailor outreach efforts effectively. Collaborated with community leaders to build partnerships and increase civic engagement.

* Played a pivotal role in achieving a decisive win with 62% of the vote.
* Boosted voter participation to 18%, surpassing the usual 10% benchmark.

City of Round Rock Safety Initiative Oct 2023 – Dec 2023

Consultant

Spearheaded social media marketing initiatives to increase online visibility and engagement. Analyzed campaign data to optimize strategies for higher conversion rates. Collaborated with graphic designers to create visually appealing digital content.

* Successfully gathered 10,000 signatures for a petition for a new digital billboard campaign.
* The campaign surpassed its goal of 5,000 signatures, showcasing effective community engagement strategies.

PNC Bank Jun 2016 – May 2023

Treasury Management Officer/Vice President Bank & Business Banking Center Manager

Optimized client cash flow and minimized financial risk by recommending and implementing tailored cash management solutions. Analyzed and forecasted client financial needs to facilitate strategic investment decisions and manage bank account operations. Negotiated service terms with financial institutions, ensuring favorable conditions for cash management, wire transfers, and foreign exchange transactions. Monitored market trends and regulatory changes to provide clients with up-to-date financial guidance.

* Strengthened understanding of financial instruments, including commercial loans and lines of credit, to support client investment strategies.
* Led business development initiatives, focusing on outside branch calling efforts and community involvement to expand client relationships and increase market share.
* Drove business banking results through effective business development and relationship management, resulting in significant revenue growth and market share expansion.
* Mentored a high-performing team, promoting employee engagement and ensuring adherence to regulatory guidelines and policies.
* Implemented a client experience strategy that leveraged technology for easier banking solutions, enhancing client financial well-being.

The Simple Vegan Life Feb 2016 – Mar 2021

Founder & CEO

Launched and grew a health-focused nutrition company specializing in delicious vegan offerings and actionable lifestyle guidance. Strategized and executed business plans that positioned products in a competitive market, ensuring alignment with health-conscious consumer trends. Developed and maintained strong vendor relationships to secure product placement and supply chain efficiency. Oversaw all aspects of company management, including product development, marketing strategy, and financial oversight.

* Cultivated and leveraged vendor partnerships to streamline operations and enhance product availability.
* Pioneered innovative sales strategies that significantly increased company visibility and market share.
* Demonstrated strong leadership and project management skills, driving company growth and team productivity.

Wells Fargo Insurance Inc Jan 2009 – May 2016

Insurance Agent

Provided comprehensive insurance solutions to a diverse client base, navigating complex policy options to address individual needs effectively. Leveraged strong interpersonal and negotiation skills to build and maintain lasting client relationships, ensuring high levels of customer satisfaction. Analyzed clients' financial situations to recommend appropriate insurance products, optimizing coverage and value. Spearheaded team development initiatives, fostering a collaborative environment conducive to achieving sales targets. Conducted in-depth market research to stay abreast of industry trends and government policies impacting insurance practices.

* Earned recognition as 'Top Team of the Year' due to exceptional team performance and sales excellence.
* Cultivated a robust network of clients through adept relationship-building and superior sales strategies.

Additional Experience

Insurance Agent & Wholesaler, Nationwide Insurance Company, Columbus, OH

Teacher, The Peace Corps, South Africa

Education

Master of Business Administration

Franklin University

Master Certificate of Public Policy

Princeton University

Bachelor of Science in Mathematics

Ohio State University