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| **EDUCATION**  |  | **EXPERIENCE** **WOLF GROUP** hiladelphia, PA* Assisting HKFS teammates with relationship development
* Develop the location level sales plans and establish inventory turns by store at each half to generate original plan stock to sales and inventory targets
* Accredited to distribute Wealth Management approved products (Managed Investments, Superannuation, Risk Insurance, Gearing Products)
* Help manage work flow within department via department activity tracking system. Help maintain accurate records and document storage for compliance purposes
* Work with Business Development Consultants to promote to Financial Advisors the importance of planning in attracting and retaining clients
* Make sure that service and operational quality standards are applied and compliance and risk management rules are followed
* Accredited to distribute Wealth Management approved products (Managed Investments, Superannuation, Risk Insurance and Gearing Products)

**EICHMANN LLC** Boston, MA* Develop long-range financial goals incorporating merchandise strategy with Omni DPM/PM, supporting company growth initiatives
* Develop strategic seasonal and annual sales, margin and turn plans, facilitating innovative solutions and resolution of issues to align with company business plan with Omni DPM/PM
* Develop monthly vendor, financial class and departmental pre-season plans for sales, markdowns, receipts, markups, gross margin, stock, and all financial metrics by channel and chain in PACE planning system
* Present financial plans for all financial metrics. Communicate risk and opportunities
* Analyze and measure financial results on sales, margin, and receipts to identify opportunity at the vendor, financial class, and department level
* Develop “What If” scenarios and opportunity analysis to recommend and communication action to merchandise strategy and tactics
* Develop self – complete ongoing professional development and training. Stay current on management best practices

**TURNER INC** Philadelphia, PA present* Developing and executing a meaningful employee development plan
* Developing strong working relationships with internal support teams
* Supporting advisors in developing a yearly review of the financial plan, including when and how to incorporate to their practice
* Facilitating communications between Head Office departments, branches, advisors and Branch Managers on issues, processes and programs
* Providing support to advisors from all registration types: MFDA, IIROC and Insurance-only
* Ensuring corporate compliance framework is upheld
* Building effective working relationships across the team and with various business line and corporate function contacts
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| **Bachelor’s Degree in Business**UNIVERSITY OF TENNESSEE |  |
| **KEY SKILLS** * Excellent personal organisation and time management skills, with the ability to coordinate workflow through prioritisation of tasks and diary management
* Basic knowledge of financial planning concepts
* Proven sales ability and record of developing client relationships to include excellent customer services skills
* Strong knowledge of managing financial investments and appropriate investing regulations
* Expand existing BMO relationships by consolidating the investable assets of mass affluent customers to increase BMO's share of wallet
* An excellent foundation of technical knowledge in superannuation, trust and taxation law
* Highly developed research skills, which may be demonstrated by your ability to interpret and research complex tax and super legislation and ATO rulings
* Strong relationship builder – able to establish both internal and external working relationships to identify and implement strategies for business growth
* Ability to independently analyze, structure, and review financial planning documents
* Excellent writing skills on technical topics such as superannuation and tax
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