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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 |
| **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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