



(405) 314-7509



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Austin, TX



EDUCATION

University of Oklahoma

Bachelor's Degree in Business Communications
2017 - 2021

PROFESSIONAL LICENSES

- General Securities Representative Exam - Series 7
- Uniform Securities State Law Examination - Series 63

SKILLS

- Strong organizational and time-management skills
- Exceptional communication and interpersonal skills
- Ability to work independently and as part of a team
- Detail-oriented and able to handle multiple tasks simultaneously
- Experience in managing client relationships and accounts.

PROFESSIONAL EXPERIENCE

Brokerage Service Representative

Charles Schwab and Co. | 2022 - Present

- Accepted to be apart of mentorship program at Charles Schwab for all new hires.
- Gained expert knowledge in asset protection by joining the client security and asset protection team.
- Collaborated with manager to encourage team cohesion and synergy amongst peers.
- Provide support to over 40 clients daily concerning administrative issues and financial needs.
- Conducted daily market analyses and remained diligent on all industry rules and regulations.
- Assisted In the integration of 11 million retail clients and \$1 Trillion in assets during the TD Ameritrade merger.

Senior Associate

PFS Web. | 2021 - 2022

- Facilitated client and brand relationships in order to successfully market the team.
- Created and successfully integrated excel sheets in order to better track daily sales and order fulfillment for the team.
- Managed daily sales and fulfillment documents in order to keep tracking accessible for upper management.