

Client Services Executive

- Delegate client needs to investment firms and insurance companies
- Create and design reports
- Hire train and supervise staff.
- Maintain records in compliance with legal requirements

1996-1998 American Express Financial Advisors Glendale, CA

Administrative Assistant

- Provide administrative support to financial planners
- Prepare and process applications for clients
- Scheduled appointments with prospective clients

EDUCATION

2008

Continuing education Courses in Professional Fiduciary Management
Cal State Fullerton

2001

University of California Los Angeles

- BA in Psychology

LICENSE

Licensed Professional Fiduciary (State of California License # 301)

National Certified Guardian
