

## EXECUTIVE SUMMARY

A **technical support and compliance expert** with 11 years of experience in the financial services and construction industries. A curious and detail-oriented professional who specializes in transactions analyses, mentoring and training, and supporting the rollout of new banking technologies.

## FUNCTIONAL EXPERTISE

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- Performing Transaction and Behavior Analyses
- Claims, Fraud, and Risk Management
- Working Cross-functionally and in Teams
- Managing Inbound Service Requests
- Tech Support for Financial Technologies
- Exceeding CCC KPIs/Metrics

## FUNCTIONAL EXPERTISE DEMONSTRATED

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### [EAZL INTERNATIONAL BANK](#)

June 2018 – Present

*One of the West Coast's largest banks with ~14,000 employees and 600 branches in 8 US states.*

#### **Service and Sales Specialist—Online Banking** (August 2016 – Present)

Fraud and tech support for all Eazl external client groups (e.g. private banking, business, and retail banking).

- **Claims, Fraud, and Risk Management:** Processes ~100 inbound fraud claims per month, interviewing customers, collecting transactional data, and summarizing claims for the financial fraud unit. E.g. part of the team that handled the rollout of Apple Pay which resulted in a 5% increase in technology-related fraud claims.
- **Tech Support for Financial Technologies:** Successfully manages high volumes of inbound technical support tickets related to emerging financial technologies (e.g. Android, ApplePay, etc.). Regularly contributes to compliance and security-related initiatives related to new financial technologies.
- **Working Cross-functionally and in Teams:** Contributes to a 10-person integrations and applications team that tests new financial technology launches. E.g. beta tested the launch of Eazl's remote ATM withdrawal function that was successfully rolled out in March 2015.

#### **Service and Sales Specialist—Retail Banking** (June 2012 – August 2016)

Successfully processes up to 80 support and sales tickets/day from external clients and internal users.

- **Managing Inbound Service Requests:** Diagnoses and processes up to 80 service requests/day from various account holders while successfully adhering to the compliance requirements of multiple unique product packages. Maintains knowledge of banking product lines to cross and up-sell clients if needs are going unmet.
- **Exceeding CCC KPIs/Metrics:** Consistently exceeds CCC KPIs related to average call handle time (AHT), QA metrics, and sales metrics. E.g. one of Eazl's top producers in 2015 with SRC revenues exceeding \$1mm.
- **Working Cross-functionally and in Teams:** Served as a team integration leader for Eazl's mergers with Procore Bank in 2008 and CalPay Bank in 2014, acting as the training point of contact for an 11-person team. Regularly performing peer coaching sessions and QA duties (e.g. listening in on support calls).

### *PRIOR WORK EXPERIENCE:*

Office Manager, Eazl Unlimited Inc. (April 2008 – June 2012)

## EDUCATION

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Master of Science (Communications) **3.26/4.0 GPA**. [Eazl University](#) (San Francisco, California)

**Bachelor of Arts (Elementary Education) 3.7/4.0 GPA.** Eazl University (San Francisco, California)

**OTHER RELEVANT INFORMATION**

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**Additional Languages:** French (Advanced), German (Bi-lingual Fluency), Polish (Beginner)

**Technical Skills:** Salesforce (Master), MS Excel (Advanced), MS Word (Master), MS Power Point (Intermediate)  
TPSS and 20+ Banking Systems.

**Volunteerism:** *San Francisco Botanical Garden*—Volunteer Landscaper (2016-2017)  
*Petaluma Rescue Mission*—Shelter Volunteer (2015)