

EDUCATION:

Master of Public Administration:

Maxwell School of Syracuse University, Syracuse, NY
Expected Graduation: June 2006

Bachelor of Arts in Art History:

Smith College
Northampton, MA
1996

- Dean's List

RELEVANT COURSEWORK:

- Public Budgeting
- Public Organizations & Management
- Quantitative Analysis
- Managerial Economics
- Federal Policy Making
- State & Local Finance
- Policy Implementation
- Information Strategy in the Public Sector

TRAINING:

- NASD Series 7, 6, 63
- Life and Health Insurance Licenses (Expired in 2004)

COMPUTER SKILLS:

- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint
- SPSS
- FIN
- Bloomberg Financial®

AFFILIATIONS:

- American Society for Public Administration (ASPA)
- International City/County Management Association (ICMA)

CAREER PROFILE

Focused and results driven professional with over eight years of experience, utilizing management principles, analytical skills, and problem solving ability to improve business policies and processes for optimal efficiency and effectiveness. Professional training in investments and insurance. Experience gathering and analyzing data, recommending appropriate strategies to achieve and exceed corporate objectives. Excellent interpersonal skills, able to communicate and collaborate effectively with clients at all levels. Managed projects and ad hoc assignments under strict deadlines. Proficient in Korean.

PROFESSIONAL EXPERIENCE

Client Services Specialist

RNC GENTER CAPITAL MANAGEMENT, LLC, Los Angeles, CA **2002-2005**

- Worked directly for CEO of midsize private asset management company and handled daily activities of 260 clients with \$350 million in assets under management
- Maintained good business and working relationships with high net worth clients utilizing telephone and written correspondence
- Prepared over 100 client reviews and presentations
- Processed daily cash inflows and outflows, solved management fee discrepancies, and responded to client requests in a timely fashion
- Performed targeted queries, created income projection reports, and monitored accounts using FIN
- Collected economic data from various departments to update monthly market charts/graphs
- Successfully managed closure of RNC Mutual Fund and process of transferring large number of accounts in a limited time frame
- Completed special projects, including the preparation of a District Court Judge's annual financial disclosure with 100% accuracy
- Progressively increased supervisory responsibilities and trained a personal assistant

Sales Assistant

CROWELL, WEEDON & CO., Los Angeles, CA **2001- 2002**

- Placed daily equity, bond and option trades for a Broker managing over \$250 million
- Maintained detailed purchase and sales transaction reports and monitored call option strategy
- Researched stock splits, mergers, and spin-offs on Bloomberg Professional®
- Investigated missing cost basis information and reconstructed account histories

Marketing Assistant

THE MONY GROUP, INC. (now AXA FINANCIAL, INC.), Farmington Hills, MI **1998-2001**

- Played a vital role in establishing the Financial Advisor and provided revenue generating business marketing and operations support
- Created professional presentations and projections using MS Word, Excel and Power Point
- Reviewed all account paperwork for suitability, completeness, and accuracy
- Engaged in extensive follow-up to ensure timely approval of applications and asset transfers
- Identified new business opportunities resulting from change in tax laws, fiscal policies, and industry trends

Financial Professional

THE EQUITABLE, INC. (now AXA FINANCIAL, INC.), Southfield, MI **1997-1998**

- Interviewed clients to gather financial data, assess needs, and identify problem areas
- Provided analysis and asset management and accumulation strategy to clients
- Explained complex financial concepts such as diversification, compound interest, dollar-cost-averaging, asset allocation, and time-value of money in every-day language
- Selected appropriate investment and insurance products that were compatible with client's risk tolerance and helped meet short and long-term objectives

LEADERSHIP EXPERIENCE

Special Events Team Volunteer

12th ANNUAL APEX AWARDS GALA , Los Angeles, CA **2004**

- Recruited volunteers, organized work schedules, and supervised registration tables at event

Vice President (Music Chair)

AFTER FIVE WOMEN'S CLUB, Livonia, MI **1998-2000**

- Planned and organized live entertainment (soloists, bands, trios) for monthly dinner event of approximately 50 people, and served as a Guest Relations Officer providing support to assessed guests needs
- Designed monthly invitations; participated in event set up and guest registration