

# Las Cruces Public Schools Online Application

Montanez, Steve - AppNo: 27778

Date Submitted: 7/28/2016

## Personal Data

**Name:** Steve (First) (Middle Initial) Montanez (Last)

**Other:** Other name(s) under which transcripts, certificates, and former applications may be listed:

**Email Address:** (First) (Middle Initial) (Last)

## Postal Address

### Permanent Address

Number & Street:  
 Apt. Number:  
 City: Las Cruces  
 State/Province: NM  
 Zip/Postal Code: 88011  
 Country: United States of America  
 Daytime Phone:  
 Home/Cell Phone:

### Present Address

Number & Street:  
 Apt. Number:  
 City:  
 State/Province:  
 Zip/Postal Code:  
 Country:  
 Phone Number:

## Employment Desired

Open Vacancy Desired:

JobID: 4878	Superintendent: Superintendent at Administration Building	Date Last Submitted 7/28/2016	Experience in Similar Positions 10 years
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## Experience

Please list ALL WORK experience beginning with the most recent.

Current or Most Recent Position		Employer Contact Information		Supervisor/Reference Contact Information	
ADP Manager		1851 Resler El Paso, TX 79912 915-541-3518		Kara Castro	
<b>Date From - Date To:</b>	09/2011 - 04/2016	<b>Full or Part Time:</b>	Full		
<b>Reason for Leaving:</b>	Layoff				
<b>Responsibilities/Accomplishments at this Position</b>	Lead a team of payroll specialist, write and administer performance appraisals, recruit talent, coach and develop, community involvement such as junior achievement				

## Education

Please tell us about your educational background beginning with the most recent.

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**High School Attended:** Coronado high school, El Paso, TX  
**Graduation Status:** H.S. Diploma

## Colleges, Universities and Technical Schools Attended:

Name and location	Dates Attended: From - To	Major area of study and number of semester hours	Minor area of study and number of semester hours	Degree	Date Conferred or Expected
AZ - University of Phoenix	01/2002 10/2004	MBA Business Hrs:	Hrs:	MBA	06/2016
AZ - University of Phoenix	01/2000 10/2001	Business Management Hrs:	Hrs:	BS Business	06/2016

<b>Overall GPA</b>	<b>Undergraduate</b>	<b>Graduate</b>
<b>Major GPA</b>		
<b>Highest Degree Attained</b>	<b>Number of graduate hours beyond your highest degree:</b>	<b>Grad Program Of Study</b>
MA/MS/etc.		Business Management

**List honors, awards or distinctions you have earned:**

## Certification

Do you hold National Board for Professional Teaching Standards certification? **No**

Do you hold or anticipate a New Mexico certificate? **No**

\* Have you applied for a New Mexico certificate? **No**

\* List the date you applied for certification:

\* Have you received a deficiency statement? **No**

\* Have you passed the Basic Skills Exam? **No**

\* Have you passed the Content Area Exam? **No**

If pending, date test taken

Do you hold a current out-of-state certificate? **No**

State	Type	Certificate Number	Expiration Date	Current?

**List your out-of-state certified teaching/administration fields:**

## Language Skills

Do you know any language other than English? **Yes**

**Language(s):** Spanish

**Oral Level:** Fluent

**Written Level:** Literate

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## Referrals

How did you hear about employment with us?

Other: Las Cruces Public Schools Website

## Additional Information

List any additional information which will help in determining your professional qualifications for a position.

Upload any additional documents.

## Disclosures

### Contract Status

\* Are you currently under contract?

No

If Yes, which district?

If Yes, when does it expire?

### Professional Status

\* Have you ever had a teaching certificate or teaching license revoked or suspended?

No

If Yes, explain:

\* Have you ever failed to be rehired, been asked to resign a position, resigned to avoid termination, or terminated from employment?

No

If Yes, explain:

\* Are you a relative of any board member, administrator, or supervisor who is currently serving the School District?

No

Name:

Position:

Relationship:

\* Can you perform all the essential job function(s) of the position(s) for which you are applying?

Yes

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## Legal Information

Please note: Applicants are not obligated to disclose sealed or expunged records.

\* Can you provide documentation that you can legally work in the United States for the entire school year? Yes

\* Have you ever been convicted of a criminal offense other than a minor traffic violation? No

If yes, explain, giving dates:

Please Note: A conviction will not necessarily bar you from employment. Facts, such as date of occurrence and rehabilitation will be considered. This information will be used only for job-related purposes and only to the extent permitted by applicable law.

\* Have you ever had any indicated finding of child abuse filed in your name? No

If yes, explain, giving dates:

\* Does your name appear on any Sex Offender Database in any state or country? No

## Equal Opportunity Employer

Las Cruces Public Schools is an Equal Opportunity Employer. Las Cruces Public Schools ensures equal employment opportunities regardless of race, creed, gender, color, national origin, religion, age, sexual orientation or disability. Las Cruces Public Schools has a policy of active recruitment of qualified minority teachers and non-certified employees. Any individual needing assistance in making application for any opening should contact the Department of Human Resources.

## Applicant's Acknowledgment and Agreement, Authorization, Waiver, and Release

I hereby certify that the information contained in this application is true, accurate and complete, to the best of my knowledge and belief. I understand and agree that any misrepresentation or willful omission of facts shall be sufficient cause for disqualification of my application or for termination of my employment. Failure to provide all or part of the information requested may result in the refusal of the Las Cruces Public Schools District to further consider me for possible employment.

I hereby authorize the Las Cruces Public Schools District and its agents to investigate my work history and education history and to conduct personal inquiries. I understand that the Las Cruces Public Schools District will send a copy this Agreement and Authorization to each individual or entity from whom it is seeking a reference or background information.

I hereby authorize the party receiving a copy of this signed form (including a photocopy or facsimile copy) to provide and release complete information as may be requested, and I hereby waive any claim of confidentiality I might have with regard to such information.

I hereby release any person or entity providing information or records in accordance with this Agreement, Authorization, Waiver, and Release from any and all claims or liability for compliance.

I AM ALSO WAIVING ANY RIGHT OF ACTION, CAUSE OF ACTION OR OTHER MEANS OF REDRESS I MAY HAVE AGAINST ANY PERSON OR ENTITY SUPPLYING EMPLOYMENT-RELATED INFORMATION--INCLUDING BUT NOT

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LIMITED TO INFORMATION CONCERNING MY BACKGROUND, WORK HISTORY, AND DISCIPLINARY HISTORY--TO THE LAS CRUCES PUBLIC SCHOOLS DISTRICT UNDER A GUARANTEE OF CONFIDENTIALITY.

I understand and agree that if I am considered as a finalist for, or I am actually recommended for employment, I will submit to a criminal background investigation, including mandatory fingerprinting, at my expense, to determine my acceptability for employment. Criminal convictions shall not automatically bar an applicant from obtaining employment with the School District, but pursuant to the Criminal Offender Employment Act of New Mexico (NMSA 1978, 28-2-1, et seq.), such convictions may be the basis for refusing employment. I understand that any employment offer is contingent upon the satisfactory completion of all background checks.

I understand that the information contained in this application and the information submitted by me or obtained pursuant to this agreement and authorization is confidential, for the exclusive use of the Las Cruces Public Schools District and its agents for employment decisions, and will not be transferred to any other entity without my written authorization unless required to be disclosed upon request by either New Mexico or federal law.

I, Steve Montanez, agree to all of the terms above.

I agree

# Official Academic Transcript from University of Phoenix

## Statement of Authenticity

This official academic transcript has been delivered to you through eSCRIP-SAFE, the Global Electronic Transcript Delivery Network, provided by Credentials eScrip-Safe, 9435 Waterstone Blvd, Suite 260, Cincinnati, OH 45249, 1-847-716-3805. Credentials eScrip-Safe has been appointed and serves as the designated delivery agent for this sending school, and verifies this sender is recognized by the accreditation source identified below

This official academic transcript was requested, created, and released to the recipient following all applicable state and federal laws. It is a violation of federal privacy law to provide a copy of this official academic transcript to anyone other than the named recipient.

This PDF document includes: the cover page, the official academic transcript from the sending school, and the academic transcript legend guide.

The authenticity of the PDF document may be validated at the Credentials eScrip-Safe website by selecting the Document Validation link. A printed copy cannot be validated.

Questions regarding the content of the official academic transcript should be directed to the sending school.

## Sending School Information

University of Phoenix  
Registrar's Office  
4025 S. Riverpoint Parkway  
Phoenix, AZ 85040  
Telephone: 602.557.3386  
School Web Page: <http://www.phoenix.edu>  
Course Catalog Web Page: <http://www.phoenix.edu/programs/degree-programs/academic-catalog.html>  
Accreditation: North Central Association of Colleges and Schools, The Higher Learning Commission (NCA-HLC)

## Student Information

Student Name: Steve Montanez  
Numeric Identifier: Not Provided By the Sending School  
Birth Date: Not Provided By the Sending School  
Student Email:

## Receiver Information

Steve Montanez

 eSCRIP-SAFE®

## Document Information

Transmitted On: Mon, 18 April 2016  
Transcript ID: TRAN000009471496

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If you are not the identified receiver please notify the sending school immediately.

Transcripts marked 'Issued to Student' are intended for student use only.  
Recipients should only accept academic transcripts directly from the sending school.

Date Issued: 04/18/2016  
 Record of: STEVE A. MONTANEZ  
 Student Number:  
 Birthdate:  
 Enrollment Status: Graduated  
 Enrollment Status Effective Date: 10/25/2004

SENT TO:  
 STEVE MONTANEZ  
  
 SANTA TERESA , NM 88008-9333  
 US

**Prior Schools Attended**

THE UNIVERSITY OF TEXAS AT EL PASO  
 WEST CHESTER UNIVERSITY OF PENNSYLVANIA  
 MONTGOMERY COUNTY COMMUNITY COLLEGE

*Credits*      *Degrees*

AGS

<i>Mo/Year</i>	<i>Course ID</i>	<i>Course Title</i>	<i>Grade</i>	<i>Credits Attempted</i>	<i>Credits Earned</i>	<i>Quality Points</i>	<i>Rep</i>
<b>UNIVERSITY OF PHOENIX</b>							
01/2001	MGT/330	MANAGEMENT THEORY, PRACTICE, AND APPLICATION			3.00		
02/2001	CIS/319	COMPUTERS AND INFORMATION PROCESSING			3.00		
04/2001	MGT/331	ORGANIZATIONAL BEHAVIOR			3.00		
05/2001	MTH/208	COLLEGE MATHEMATICS I			3.00		
06/2001	MTH/209	COLLEGE MATHEMATICS II			3.00		
08/2001	PHL/251	CRITICAL THINKING			3.00		
08/2001	MKT/421	MARKETING			3.00		
10/2001	MGT/436	CRITICAL THINKING AND DECISION-MAKING			3.00		
11/2001	MGT/437	PROJECT MANAGEMENT			3.00		
12/2001	MGT/431	HUMAN RESOURCES MANAGEMENT			3.00		
02/2002	MGT/434	EMPLOYMENT LAW			3.00		
03/2002	MKT/438	PUBLIC RELATIONS			3.00		
04/2002	PHL/323	ETHICS IN MANAGEMENT			3.00		
04/2002	FIN/324	FINANCIAL ANALYSIS FOR MANAGERS I			3.00		
05/2002	MGT/449	QUALITY MANAGEMENT AND PRODUCTIVITY			3.00		
06/2002	FIN/325	FINANCIAL ANALYSIS FOR MANAGERS II			3.00		
06/2002	MGT/480	BUSINESS RESEARCH APPLICATIONS			3.00		
07/2002	MGT/448	GLOBAL BUSINESS STRATEGIES			3.00		
08/2002	QNT/321	STATISTICS IN BUSINESS I			3.00		
09/2002	QNT/322	STATISTICS IN BUSINESS II			3.00		
11/2002	GEN/480	INTERDISCIPLINARY CAPSTONE COURSE			3.00		
01/2003	COM/515	MANAGERIAL COMMUNICATION			1.00		
02/2003	LAW/529	LEGAL ENVIRONMENT OF BUSINESS			3.00		
04/2003	QNT/530	STATISTICS AND RESEARCH METHODS FOR MANAGERIAL DECISIONS			3.00		
05/2003	MGT/554	OPERATIONS MANAGEMENT			3.00		

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Date Issued: 04/18/2016  
 Record of: STEVE A. MONTANEZ  
 Student Number:  
 Birthdate:  
 Enrollment Status: Graduated  
 Enrollment Status Effective Date: 10/25/2004

Mo/Year	Course ID	Course Title	Grade	Credits Attempted	Credits Earned	Quality Points	Rep
07/2003	ECO/533	ECONOMICS FOR MANAGERIAL DECISION MAKING		3.00			
08/2003	ACC/529	ACCOUNTING FOR MANAGERIAL DECISION MAKING		3.00			
09/2003	ORG/502	HUMAN RELATIONS AND ORGANIZATIONAL BEHAVIOR		3.00			
10/2003	FIN/544	FINANCE FOR MANAGERIAL DECISION MAKING		3.00			
10/2003	MKT/551	MARKETING MANAGEMENT		3.00			
11/2003	CIS/564.4	INFORMATION MANAGEMENT IN BUSINESS		3.00			
01/2004	EBUS/500.1	E-BUSINESS PRINCIPLES AND PRACTICES		3.00			
02/2004	MGT/573	PROJECT MANAGEMENT IN THE BUSINESS ENVIRONMENT		3.00			
03/2004	QNT/531	ADVANCED PROBLEMS IN STATISTICS AND RESEARCH METHODS		3.00			
04/2004	FIN/545	ADVANCED PROBLEMS IN FINANCE		3.00			
08/2004	MGT/578	STRATEGY FORMULATION AND IMPLEMENTATION		3.00			
09/2004	MGT/599	CASES IN DECISION MAKING		3.00			

GPA Credits Attempted Credits Earned Quality Points

Total Cumulative Credits:

UOPX Cumulative:

BSB/MProgram GPA :

MBA Program GPA :

**UNIVERSITY OF PHOENIX**  
 DEGREES, CERTIFICATES

BACHELOR OF SCIENCE IN BUSINESS/MANAGEMENT : COMPLETED 12/12/2002 , CONFERRED 12/2002  
 MANAGEMENT

MASTER OF BUSINESS ADMINISTRATION : COMPLETED 10/25/2004 , CONFERRED 10/2004

\*\*\*\*\*End of Transcript\*\*\*\*\*

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# UNIVERSITY OF PHOENIX

Registrar's Office / Phone: 1-800-866-3919 / Fax: 480-643-1041

## Transcript Key

### General Information

The University of Phoenix is a private University founded in 1976. The University offers degrees, certificates and other programs for working adults. Courses are taken at various campus locations throughout the world.

Asia College of University of Phoenix began operations April 2006 and was an associate degree granting College of University of Phoenix through November 2011. Accordingly, some courses were previously identified as belonging to Asia College in the course title.

All grades and University transcripts are issued by the Registrar's Office in Phoenix, Arizona.

### Accreditation

University of Phoenix is accredited by The Higher Learning Commission and is a member of the North Central Association. University of Phoenix was placed on Notice by The Higher Learning Commission, effective June 27, 2013. For additional information, contact The Higher Learning Commission, neahle.org. The Associate of Arts in Business, Associate of Arts in Accounting, Associate of Arts in Accounting Foundations, Bachelor of Science in Accounting, Master of Science in Accounting, Bachelor of Science in Business, Master of Business Administration, Executive Master of Business Administration, Master of Management, Doctor of Management, and Doctor of Business Administration programs are accredited by the Association of Collegiate Business Schools and Programs (ACBSP). The Bachelor of Science in Nursing and Master of Science in Nursing programs are accredited by the Commission on Collegiate Nursing Education (CCNE). The Master of Science in Counseling/Community Counseling and Master of Science in Counseling/Clinical Mental Health Counseling programs offered in Phoenix and Tucson, Arizona, and the Master of Science in Counseling/Mental Health Counseling program offered in Utah are accredited by the Council for Accreditation of Counseling and Related Educational Programs (CACREP). The Master of Arts in Education program with options in Elementary Teacher Education and Secondary Teacher Education is accredited by the Teacher Education Accreditation Council (TEAC).

The Higher Learning Commission of The North Central Association.

30 North LaSalle St., Suite 2400  
Chicago, IL 60602-2504  
(800) 621-7440

[www.ncahigherlearningcommission.org](http://www.ncahigherlearningcommission.org)

Association of Collegiate Business Schools and Programs  
7007 College Blvd Suite 420  
Overland Park, KS 66211  
(913) 339-9356

[www.acbsp.org](http://www.acbsp.org)

Commission on Collegiate Nursing Education  
One Dupont Circle, NW  
Washington, DC 20036-1120  
(202) 887-6794  
[www.aacn.nche.edu](http://www.aacn.nche.edu)

Council for Accreditation of Counseling and Related Educational Programs  
5999 Stevenson Ave  
Alexandria, VA 22304  
(703) 823-9800 Ext. 301  
<http://www.cacrep.org/>

Teacher Education Accreditation Council  
One Dupont Circle, Suite 320  
Washington, DC 20036-0110  
[www.teac.org/](http://www.teac.org/)

### Transcript Policies

Transcripts are issued only with authorization from the student unless requested by a judicial order or legally issued subpoena.

### Credit and Calendar

All credits awarded are semester credits. The University of Phoenix offers concentrated courses on a continuous year-round basis.

### Certification of Official Transcripts

All official transcripts carry the Registrar's signature in white with a blue background and include the college name printed across the face of the document. A raised seal is not required.

### Course Numbering System

100-299	Freshman and Sophomore level
300-499	Junior and Senior level
500-599	Graduate level
600-699	Professional Courses; applicable to undergraduate or graduate degree programs.
700-799	Doctorate level

Courses identified by numbers 299 and 399 indicate Prior Learning Assessment credit as represented by specific national accrediting bodies' transcripts, diplomas, certificates, standardized credit recommended by National College Credit Recommendation Service, and evaluation of professional training courses and experiential learning essays.

Spanish MBA students must be proficient in Spanish in order to participate in class and complete required assignments.

### Grading System

#### September 1, 2007-Present:

A	4.00	C	2.00
A-	3.67	C-	1.67
B+	3.33	D+	1.33
B	3.00	D	1.00
B-	2.67	D-	.67
C+	2.33	F	.00

#### Prior to September 1, 2007:

A	4.00	C-	1.66
A-	3.66	D+	1.33
B+	3.33	D	1.00
B	3.00	D-	.66
B-	2.66	F	.00
C+	2.33	I	.00
C	2.00	I/F	.00

Grade point average is calculated by dividing the number of quality points by the number of units attempted.

### Grades Not Calculated in GPA

I - Incomplete: Student granted extension to complete assignments.

IP-In Progress: Student is in the process of completing a course. (Limited use)

IX - In Progress: Student granted extension. (Limited use)

NC-No Credit: Student withdrew from the course; no grade was issued. Grades issued prior to May 1991.

P-Passing: Student satisfactorily completed the course.

W-Withdrawal: Student withdrew from the course.

WC-Waived with Credit: University of Phoenix required course waived with credit.

WT-Withdrawal/Failing: Student withdrew from the course and was failing the course at the time of the withdrawal.

QC-No grade was issued. No credits awarded.

AU-Audit: Student audited the course. Audit grades do not apply toward degree requirements.

Certain courses require minimum grades to earn academic credit. Grades not meeting this standard are reflected as 0 credits earned on transcript.

### Academic Standing

AD-Academic Disqualification: Student failed to achieve minimum grade point average.

SD-Scholastic Disqualification: Student did not meet minimum grade requirement for a course in their program.

SS-Scholastic Suspension: Student is suspended for a period of time.

EX-Expulsion: Student is expelled and not allowed to return to the University.

### Repeats (R)

The course was repeated or an equivalent course has been completed. (Only the repeated course is calculated in the GPA.)

### Release of Information

This record has been released according to provisions of the Family Educational Rights and Privacy Act of 1974 (FERPA). Release of this record without the consent of the student is prohibited by federal law. Possession of this record requires compliance with FERPA.

13000013

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This document cannot be released to a third party without the written consent of the student. This is in accordance with the Family Educational Rights and Privacy Act of 1974. ALTERATION OF THIS DOCUMENT MAY BE A CRIMINAL OFFENSE!

**Steve Montanez**

♦ Las Cruces, NM 88011 ♦

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## ***EXECUTIVE PROFILE***

### **Manager/Trainer**

*Dynamic and highly-successful business and financial leader with outstanding record of success providing financial advice, mentoring, coaching and developing . Experience includes recruiting, coaching, developing, and monitoring development and implementing long- and short-term business and compliance solutions. Demonstrated proficiency in effectively managing registered representatives, cross-functional teams and budgets while managing and motivating staffs of high-performance professionals.*

## ***PROFESSIONAL SUMMARY***

### **ADP**

#### **Manager**

*El Paso, TX*  
2011-2016

- Hired, developed, and supported employees in fulfillment of our Corporate Mission
- Attended required training classes and participated in self-development as determined by business need to acquire and maintain appropriate skills
- Responsible for mentoring and coaching employees within the ADP TMS guidelines
- Proactively identified opportunities to improve operational effectiveness
- Created and facilitated new business unit initiatives to improve customer quality and associate productivity
- Instrumental in writing and administering Performance Appraisals
- Responsible for the conversion of system hardware for the business unit
- Co-Lead the initiative for rebranding the Career Path Advisors for El Paso
- Facilitated various workshops to further develop associates career direction
- Accountability for surpassing service level goals, process improvement, efficiency gains and client loyalty/retention
- Talent acquisition partner to ensure we are sourcing, recruiting and hiring the right talent for our Client Service Specialist profile to increase associate retention rates
- Workforce Management liaison to leadership team including review of staffing, adherence, availability and reporting dashboard metrics
- Responsible for executive escalations including project management of client issues through resolution and root cause analysis
- Onsite leader for ADP Nearshoring and Community involvement partnering with local colleges, Junior Achievement, United Way, and other organizations to fulfill ADP's social mission

### **International Business College**

#### **Instructor**

*El Paso, TX*  
2011-2011

- Facilitated business courses as prescribed by the Associates of Applied Arts Business Management program to include but not limited to General Office Procedures, Business Law, Business Ethics, Business Communications, Public Speaking, Accounting Principles, Computerized Accounting Software, Financial Record Keeping , Word Processing and Spreadsheets
- Responsible for developing course activities, projects, presentations, quizzes, and test material

for course content, as well as teaching methodology and delivery techniques

Charles Schwab  
Financial Advisor

Phoenix, AZ  
2010-2010

- Instrumental in providing financial guidance including Retirement plans and Banking products
- Responsible for training employees on retirement plans
- Organized motivational team building exercises to improve productivity
- Daily organizational task to include phone and project management skills
- Responsible for daily communication to peers as well as management of changes in scheduling

ADP  
Manager

El Paso, TX  
2008-2009

- Instrumental in a multi-site Quality Incentive program for the Small Business division
- Instrumental in writing Performance Appraisals
- Selected, developed, and supported employees in fulfillment of our Corporate Mission
- Attended required training classes and participated in self-development as determined by business need to acquire and maintain appropriate skills and licenses
- Responsible for mentoring and coaching employees within the policy service career path
- Proactively identified opportunities to improve operational effectiveness

USAA  
Financial Advisor/Team Leader:

Phoenix, AZ  
2005-2008

- Positioned benefits of various financial products and services to potential high net worth clients in a sales function in order to fulfill organizational asset initiatives
- Provided consistent multi-site training for recent industry and organizational updates
- Daily organizational tasks to include phone and project management skills
- Worked closely with executors, beneficiaries and successor trustees in order to facilitate transfers due to estate situations and fulfill organizational goals of asset retention
- Provided feedback for improvements to process and product owners and removed obstacles and champion change
- Responsible for changes in curriculum to keep current learning skills up to date
- Achieved optimal productivity through managing workload volumes, staffing, training needs and identifying appropriate solutions
- Responsible for daily communication to peers as well as management of changes in scheduling
- Instrumental for creation of modules as well as current learning material based on department needs
- Facilitated unit meetings on a regular basis during the director's absence
- Organized motivational and team building exercises for individual units to improve productivity
- Successfully worked with management and the training unit to implement learning modules to include: Overcoming Member Objectives, Life Events, Desktop Management, Time Management, Appraisal writing, and career development
- Experienced in design of lab based curriculum for front line employees

The Vanguard Group  
Manager:

Scottsdale, AZ  
1995-2005

- Managed a team of NASD registered representatives responsible for 70 Institutional plans: including but not limited to administering 401k plans, communicating with Human Resource Managers to implement premier customer service to their organization
- Facilitated a multi-departmental project, responsible for creating and implementing a sales

- strategy to increase new business to high net worth clients
  - Managed associates multi-site in Arizona, Pennsylvania, and North Carolina
  - Communicated with associates via teleconference, daily emails, and video conference for consistent communication, statistics, improvements, updates, and recognition
  - Developed and communicated metrics of employee productivity on a regular basis
  - Appraisal writing and representative development
  - Executed marketing strategies to target and attract potential high net worth clients
  - Facilitated weekly meetings to all levels of employees, including department managers and executive level management
  - Proven Leader in Adult Education and Classroom Management
  - Presented numerous training sessions on investment topics in new hire training classes
  - Responsible for handling all action plans and career direction for new employees
  - Certified as "Train the Trainer" for the organization's learning curriculum
  - Responsible for all constructive feedback to employees completing class work
  - Designed and led a series of investment training courses for high net worth clients
  - Hired, managed and trained a team of registered representatives who provided investment guidance
  - Coordinated and designed recruiting plans for the department. Included both full time hiring and internship positions
  - Participated with leadership team on the development of tactical planning around an approved strategy
  - Responsible for the development and implementation of hiring plans, training plans, quality, turnover/retention, disaster recovery and operating structure
  - Written correspondence and contact with clients regarding complex and disputed issues
  - Coordinated and designed recruiting plans for the department
  - Received several awards associated with Toastmaster
- 

### ***EDUCATION & PROFESSIONAL DEVELOPMENT***

University of Phoenix, Scottsdale, Arizona  
**MBA Degree**

University of Phoenix, Scottsdale, Arizona  
**BS Business Management**

Montgomery County Community College, Blue Bell, PA  
**AA Business**

**NASD Series 6 and 63**