

# Katherine Poore

Longmont, CO 80504

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6183630343

To obtain a full time position in which I can utilize abilities in deductive reasoning of facts and events in a professional setting.

#readytowork

Authorized to work in the US for any employer

## Work Experience

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### **Account Specialist**

Digital Retirement Solutions - Longmont, CO

October 2018 to Present

- Daily Account Reconciliation
- Payroll and Contribution Processing
- Distribution and Payment Processing
- Loan Origination and Administration
- Retirement Plan Services Administration

### **SR BOSS Associate**

Waddell & Reed - Mission, KS

November 2016 to September 2018

Being part of the New Business Dept, I analyze new account paperwork and input the information into our systems so that new accounts can be created. I also approve paperwork for transfer of funds. I communicate with financial advisors primarily by phone and email when issues with new account paperwork appear.

From May 2017 to January 2018, I was on loan for a special assignment to the Adjustments Department involving balancing accounts and fixing errors between key systems.

### **Problem Resolution Associate**

Waddell & Reed - Mission, KS

November 2015 to November 2016

Responsible for processing, reviewing and identifying deficiencies related to On board New Account forms

- Perform quality checks on Non-Proprietary New Account forms
- Process the responses provided by Advisors to resolve NAF deficiencies
- Notify advisors of deficiencies and provided resolution instructions via fax and phone calls
- Quality check On Board NAF and Variable Annuity NAF (VNA)

### **Mortgage Loan Acquisition Analyst**

Wells Fargo - Des Moines, IA

May 2015 to October 2015

#### Responsibilities

- As a Mortgage Loan Acquisition Analyst in Correspondence Lending at Wells Fargo, I thoroughly reviewed home mortgage loans currently held by other lenders.
- Upon reviewing the loan file and related documentation, I decided as to whether Wells Fargo should purchase the loan and take over servicing the mortgage.

### **Student Worker**

ISU DINING

August 2013 to May 2015

Iowa State University- Ames, IA

- Adept in maintaining a safe, healthy and customer-oriented environment
- Highly committed to performing as a team player
- Experience in handling of financial records
- Consistently motivated to work through various dilemmas in a timely and thorough manner
- Trained 10 new workers in food safety and customer service

## Education

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### **Bachelor of Science in History**

Iowa State University - Ames, IA

May 2015

## Skills

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- Analytics (4 years)
- Russian (4 years)
- Microsoft Office (10+ years)
- Group Facilitation (5 years)
- Social Networking (3 years)
- Operations Management (2 years)
- Financial Analysis (3 years)
- Staff Training (Less than 1 year)
- Event Planning (2 years)
- Event Management (2 years)
- Social Media Marketing (3 years)
- Paint
- Data Entry (5 years)
- Outlook
- Microsoft Excel (2 years)
- Microsoft Outlook
- 10-Key (5 years)
- Financial Analysis (2 years)
- Financial Services (5 years)
- Account Reconciliation (Less than 1 year)
- Loan Origination (1 year)

- Balance Sheet Reconciliation (Less than 1 year)

## Groups

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### **Society of Creative Anachronism**

August 2011 to Present

The Society of Creative Anachronism is a historical educational non-profit organization.

#### Volunteer

- Organized two events within the last two years
  - May 2017 event - 400 attendees with a staff of 15; activities included sports, equestrian, classes, and entertainment.
  - June 2018 event - 900 attendees with a staff 30; activities included classes, sports, a fireworks show, and other entertainment
- Regional Social Media Officer for the last 3 years
  - Promotion of good work and achievements of the regional chapter i.e. donation of 1000 toys to the Marine Corps Toys for Tots Foundation