

KRYSTA ROLLE

FINANCIAL • HOSPITALITY MANAGEMENT

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SUMMARY

Self-assured and results-driven solutions driver and management professional with more than 11 years providing account/portfolio management and administration in the wealth management and financial service sectors. Detail-oriented & analytical with critical thinking to strategize solutions that assisted rebranding initiatives, completing market and competitor research, and collaborating with various departments in producing the company's new business identity and a stronger marketing presence.

Qualifications

- Proven competence and dedication to process efficiencies in administrative support for portfolio and compliance management, including a successful bank site transfer project without disrupting operations.
- Excellent people management and communication skills that inspire customer confidence while fostering teamwork synergies with colleagues and subordinates in achieving shared objectives.

EDUCATION

Keele University, Keele, England (2006)

Double Degree: B.A. in Economics, & Human Geography, Dual Honors, Second Class Upper Division

Kingswood School, Bath, England (2003)

GCE A-Levels: Biology and Geography | GCE AS-Level: Economics and Business Studies

PROFESSIONAL SKILLS & ABILITIES

Credentials

- QuickBooks Premiere 2009 Personal Development Program, College of The Bahamas (2010)
- Certified Financial Planner, Bahamas Institute of Financial Services, Nassau, Bahamas (2008)

Technical Skills

- ✓ Technological Skills: (MS Word, Excel, PowerPoint & Outlook.)
- ✓ Financial Apps: FactSet, Capital IQ, Charles River Investment Management System, Bloomberg; MicroStrategy, IPBS, and ViewPoint Document Manager

WORK EXPERIENCE

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| Portfolio Assistant <i>Templeton Global Advisors, Nassau, Bahamas</i> | Feb 2011 - Jan 2015 |
| <ul style="list-style-type: none">➤ Provided administrative support to portfolio managers and research analysts in achieving their goals, conducting research, updating research database, processing daily trades on behalf of the Portfolio Manager, addressing compliance issues, and managing account cash position for each portfolio.➤ Assisted with monthly and quarterly client reports, correspondences, client meetings and ad hoc client requests.➤ Schedule broker and analyst meetings, collaborating analysts from other financial institutions in compiling data for presentations and special projects. | |
| Executive Assistant <i>Ansbacher (Bahamas), Ltd., Nassau, Bahamas</i> | Sep 2006 - Jan 2011 |
| <ul style="list-style-type: none">➤ Served as Communications Coordinator for all company ads, Group newsletter and donation requests.➤ Compiled and produced risk and financial reports for presentation at quarterly board meetings, including documentations and reports for any special projects. | |

ADDITIONAL INFORMATION

Note: Eager to resume a productive presence in the job markets after migrating to Central Florida from the Bahamas, administering to an elderly relative, while building a family with 2 children.

