

Theresa Franklin

1222 River Glen Row Unit 64 San Diego, CA 92111
theresafranklin619@gmail.com / 619-823-5996

Experience

Union Bank, San Diego, CA

September 2015 to August 2016

Operations Specialist

- Provided back office operational support for the private banking trust administration division in the mutual fund securities processing department
- Liaised between closing unit and 3rd party clearing firm for outgoing mutual fund transfer requests
- Assisted trading team with running maps and posting income for institutional money market accounts
- Utilized excel and ten key calculator, performed heavy data entry

Stratos Wealth Partners, San Diego, CA

October 2012 to August 2015

Transition Specialist

- Provided back office transition/onboarding support to established financial advisors in transferring their book of business to new brokerage firm platform; utilized excel to analyze advisor's book of business for repapering
- Prepared transition packets to include proper brochures, client profile sheets, announcement letters, business cards, brokerage/advisory account applications and account transfer forms
- Assisted financial advisors in opening their clients' investment accounts

Law Offices of Boner Stern and Sipple, San Diego, CA

October 2011 to August 2012

Administrative Assistant

- Provided administrative assistance to partners and paralegals: drafted cover letters, processed outgoing mail, ordered office supplies, organized files, answered telephones, created new client files, and assembled estate planning portfolios
- Drafted wills, power of attorney documents, advance health care directives and trust certifications

San Diego Firefighter's Federal Credit Union, San Diego, CA

September 2008 to May 2011

Bank Teller

- Worked with customers on a daily basis performing all teller transactions
- Opened trust, checking and savings accounts, provided telephone teller services

USA Federal Credit Union, San Diego, CA

January 2007 to March 2008

Bank Teller

- Worked with customers on a daily basis performing all teller transactions
- Met sales goals, opened checking and savings accounts

Torrey Pines Bank, San Diego, CA

July 2005 to June 2006

Bank Teller

- Worked with customers on a daily basis performing all teller transactions
- Processed ATM deposits and night drop

The Boathouse Restaurant, San Diego, CA

December 2005 to August 2007

Restaurant Hostess

- Greeted and sat restaurant guests, took reservations via telephone, assisted servers/bussers buss and set tables, prepared banquet menus, trained new hostesses

Education

California State University, San Marcos, *B.A. Criminology and Justice Studies* 2008