

CAREER

Operations Manager | **Heritage Financial Consultants LLC**, Naples, FL

Dec 2025 – Present

- Executed a rapid CRM restructuring and data-governance initiative, consolidating two databases totaling approximately 1,750 client and prospect records, eliminating roughly 15% redundant or incomplete records, and improving workflow reliability across a \$65MM AUM book of business.
- Designed and implemented 8 automated CRM workflows and lead-segmentation systems to streamline prospect nurturing, onboarding coordination, and follow-up processes across approximately 750 active leads and prospects.
- Redesigned the firm's end-to-end onboarding workflow and operational structure, eliminating redundant processes, resolving approximately 18 months of overdue workflow tasks, and improving operational efficiency across administrative and advisory functions.
- Developed a centralized digital document management and onboarding system supporting 200+ lead and prospect relationships, reducing incomplete documentation and improving compliance and onboarding accuracy.
- Established weekly KPI tracking and operational reporting frameworks monitoring pending and recognized GDC, net new assets, pipeline activity, campaign performance, budgeting, and business costs to support data-driven business strategy and resource allocation decisions.
- Conducted ROI analysis for 10+ marketing seminars and client acquisition initiatives, evaluating marketing spend, labor costs, revenue generation, and operational profitability to guide strategic growth planning.
- Led operational accountability systems and recurring cross-functional team meetings for a 6-person staff, improving execution tracking, workflow coordination, and organizational communication.
- Implemented AI-enabled workflow automation across 10 meeting types, eliminating manual meeting preparation, note summarization, follow-up drafting, CRM data entry, planning-platform updates, and meeting storage workflows, saving approximately 20 hours per week in administrative processing time.
- Directed technology stack optimization and workflow automation initiatives, integrating AI-enabled operational systems to improve scalability, reduce manual processing, and support the ongoing development of a fully automated marketing and lead-nurture infrastructure.

EDUCATION

Florida Gulf Coast University (FGCU), Fort Myers, FL

Dec 2025

Bachelor of Science in Economics, *Honors College Graduate, Cum Laude*

- Honors College Commencement Speaker
- *Study Abroad*: Summer 2025 Program in Austria with Franciscan University of Steubenville
- Thesis & Research Contracts:
 - The Anatomy of Blue-Chip Art Markets: Empirical Evidence of Within-Market Diversification of Blue-Chip Art
 - Borderlines and Bottom Lines: Labor Loss Forecasts of Mass Deportation Following SB 1718's Effect on Vital Economic Components of Florida
 - Tariffs, Trade Distortions, and Industrial Competitiveness: A Quantitative Analysis of the U.S.–Japan Auto Industry

RESEARCH

Research Assistant | **Regional Economic Research Institute (RERI)**, Fort Myers, FL

Sep – Dec 2024

- Tracked and summarized monthly leading and lagging economic indicators in SWFL to align research insights with current domestic macroeconomic trends.
- Researched scholarly literature and hard data on the collocation of artists, creatives, and Bohemian communities; analyzed datasets in R to identify economic clustering trends; utilized LaTeX to create and edit white paper drafts.

Undergraduate Research Assistant | **Florida Gulf Coast University (FGCU)**, Fort Myers, FL

Sep 2023 – May 2024

- Built financial and cost-benefit models in Excel to monetize hurricane restoration projects and evaluate long-term economic and environmental impacts; developed and applied KPIs and O&M metrics.
- Created a matrix of sister projects and proposals for Peace River and Charlotte Harbor restoration initiatives, demonstrating ecological value and economic feasibility.

INTERNSHIPS

Wealth Management Intern | **FORM Wealth Advisors**, Lake Geneva, WI May – Jul 2024

- Prepped 65%+ of weekly annual review meetings across a 4-advisor team, analyzing periodic drafts and/or payments, money market surplus or deficits, RMD projections, debt exposure, estate plans, and portfolio strategy.
- Created new prep process and checklist template with a visual flowchart for current and future employees to learn from.
- Standardized Salesforce naming and note-taking conventions; cleaned up impurities from transition from old software.
- Multitasked regular opening, mid-day, and closing duties alongside other projects including curating a list of potential M&A practices and advisors, organizing TOD linkages and up-to-date beneficiary designations, calculating multigenerational fees, and created inheritance-tracking reports for clients and prospects.

Operations Assistant Intern | **Ted Todd Insurance**, Estero, FL Mar – May 2024

- Conducted extensive research to compile a company matrix with quantitative limits, eligibility factors, and endorsements of over 15+ different insurance companies for HO3 and HO6 policies.
- Tracked hourly call trends on over 5 extensions, managed compliance: incoming and outgoing physical and digital mail regarding PI corrections and communications regarding transition of homeowner's policies to various companies.

Congressional Aide Intern | **U.S. House of Representatives**, Cape Coral, FL Jan – Apr 2024

- Assisted up to 30 constituents of Florida's 19th congressional district per workday with federal and non-federal issues.
- Managed ticket logging, constituent intake, and casework initiation processes while maintaining office standards for accuracy, responsiveness, and thorough documentation.

LEADERSHIP

Mentor | **FGCU Honors College**, Fort Myers, FL May 2024 – May 2025

- Elected as 1 of 50 top Honors College members to mentor six freshmen, offering academic, career, and personal guidance for a smooth transition to independent college life. Organized one-on-one and group sessions to create personalized action plans, tracking progress and the resulting ripple effects of each goal achieved

University Ambassador | **Florida Gulf Coast University**, Fort Myers, FL May 2024 – May 2025

- Engaged with local network and potential donors at various campus and community events, promoting FGCU programs and resources to prospective students and families.
- Built upon existing local relationships by showcasing FGCU's recent growth and sharing personal testimony on the university's resources. Collected feedback to identify areas for improvement in recruitment strategies and campus services.

Board Member | **Lutgert Student Advisory Board**, Fort Myers, FL Sep 2023 – May 2025

- 1 of 15 selected liaisons of FGCU's undergraduate business students; advocated for and in support of either new or preexisting programs that enhance what they can gain from the University's resources.
- Brought a unique perspective to the board through my experiences of polar opposite institutions, transferring, and a dramatic major switch. Encouraged development of Honors college mentor/mentee program, and transfer student resources.

SKILLS

Stata, R, LaTeX, Excel, Economic Research, Quantitative Analysis, Econometric Modeling, Regression Analysis (OLS, Logistic, Time-Series, Panel Data), Financial Modeling, KPI Reporting, Cost-Benefit Analysis, CRM & Workflow Platforms (Salesforce, Redtail, GoHighLevel), Financial Planning & Analytics Platforms (eMoney, RightCapital, YCharts)

INTERESTS

Board games, oil painting, sourdough baking, vintage furniture restoration, guitar