MEREDITH BEAZLEY

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EXPERIENCED CLIENT SERVICES MANAGER: FINANCIAL SERVICES INDUSTRY

CLIENT RELATIONSHIP MANAGEMENT | BRANCH ADMINISTRATION | SERVICE DELIVERY EXCELLENCE | TEAM LEADERSHIP & TRAINING

Proven success providing strategic leadership for all client services activities, administration, relationship management, and team training in the financial services industry

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- **Accomplished Client Services Leader** with a track record of implementing strategic branch initiatives that exceed client expectations and drive business growth.
- **Effective Relationship Builder** with extensive experience in client-facing roles, managing and growing positive client relationships. Resourceful problem solver skilled in developing solutions in deadline-driven, fast-paced environments.
- **Proven Team Builder & Trainer** with a history of recruiting, training, and managing high-performance teams. Excel in developing and leading training sessions for employees. Adept at leading collaboration across diverse departments.

Technology: Goldmine ▪ Junxure ▪ Practifi ▪ Salesforce ▪ Portfolio Center ▪ Tamarac ▪ eMoney ▪ Adobe ▪ Microsoft Office

Areas of Expertise:

✓ Client Services Management	✓ Process Development	✓ Project Management
✓ New Client Integration	✓ Customer Satisfaction	✓ Strategic Planning
✓ Staff Training & Onboarding	✓ Solution Development	✓ Reports
✓ Client Services Documents	✓ Crossfunctional Collaboration	✓ Contract Administration

PROFESSIONAL EXPERIENCE

SENIOR CLIENT RELATIONSHIP ASSOCIATE: **EP Wealth Advisors** (formerly Ballou Plum Wealth Advisors) **2013 – Present**

Served as Client Services Coordinator at Ballou Plum Wealth Advisors prior to acquisition by EP Wealth Advisors in 2016.

Oversee all aspects of Client Services Department for Lafayette branch of the investment management, financial planning, and wealth advisory firm. Direct strategic branch initiatives and the implementation of firm-wide objectives. Lead employee training for a wide variety of initiatives to support business growth. Mentor staff regarding client interactions. Ensure up-to-date, accurate client service documents. Manage client communications regarding new product functionality and administration. Establish client retention initiatives that foster client loyalty and partnerships.

- Lead the strategic planning and oversight of client services group management, relationship management, team leadership, training, and administration. Oversee client account openings, account maintenance, and money movements.
- Develop, train, and motivate Client Service Associates and administrative support staff.
- Guide the cultivation, growth, and retention of client relationships toward mutual success.
- Oversee clients' accounts, working with multiple custodians, including Fidelity, Charles Schwab, TD Ameritrade, and American Funds.
- Manage branch administration, tasking, process setting, distributions, business operations, and communications.
- Selected for firm-wide crossfunctional beta CRM testing team focused on CRM process building, roll out, and training.
- Served on CRM conversion team, overseeing the conversion from Junxure to Practifi/Salesforce, including review of CRM system to ensure efficiency and services delivery.
- Lead new hire onboarding and ongoing training, managing collaboration with diverse departments regarding introduction of corporate processes, policies, and SEC regulations.
- Manage all aspects of new client integrations, compliance, contract administration, and reporting.
- Build trusting relationships with new and existing clients as account liaison, ensuring a superior client experience.
- Manage and prioritize escalated client issues, understanding clients' needs and developing solutions that meet their goals.
- Drive growth and retention of existing business, identifying opportunities to increase customer satisfaction.
- Partner with functional groups across all lines of business to drive process improvements, problem solving, and efficiency.

– Key leader during the branch's integration with EP Wealth Advisors, including converting all accounts into new systems and providing post-acquisition account reviews and accuracy verifications.

STORE MANAGER: **Jessica McClintock** **2012 – 2013**

Managed all aspects of operations, sales staff, and financials. Managed data analysis of sales production.

– Managed all daily operations, financials, inventory, transfers, staffing, and client issues prior to store closing.
– Motivated employees to meet monthly sales goals. Ensured outstanding customer service to high-end clientele.
– Recruited, hired, and trained all sales staff. Managed human resources issues, scheduling, and attendance.
– Conducted performance reviews, handled personnel decisions, and coordinated assignments.
– Trained all employees on policies, procedures, and best practices.

ACTING STORE MANAGER / ASSISTANT MANAGER / SALES ASSOCIATE: **Destination Maternity/A Pea in the Pod** **2010 – 2012**

– Promoted to Acting Store Manager for A Pea in the Pod location.
– Oversaw daily, monthly, and yearly financials and sales figures.
– Recruited, hired, trained, and scheduled employees. Traveled to various locations to ensure smooth operations.
– Worked closely with other area stores to create a unified team; ensured a high-quality experience for customers.
– Helped open new store. Provided top-quality customer care.

Additional Experience:

SALES ASSOCIATE: Buckle ▪ Forever 21 ▪ Sur La Table

EDUCATION

Fashion Institute of Design and Merchandising – San Francisco, CA