BRITTANY DAVIS

Memphis, TN

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CAREER ACCOMPLISHMENTS

- Led end-to-end development, release, and post-release of a digital knowledge base focused on achieving operational efficiencies for financial advisors at Brunch and Budget that creates a positive and consistent client experience.
- Outstanding track record of excellent support for internal and external customers and coordination of daily operations throughout career, receiving individual and team recognition for consistent performance quality.
- At Brittany Davis and Co., developed and launched a personal finance basics course, securing 500+ enrollments, and created multimedia content that reached over 10,000 listeners, fostering financial literacy and enhancing brand recognition by 25%.

PROFESSIONAL EXPERIENCE

Brunch and Budget Brooklyn, NY

Associate Financial Planner Mar 2021 – Aug 2023

Brunch and Budget is registered as an investment adviser and is based in the state of New York. The company provides financial planning services on topics such as tax planning strategies, investment analysis, retirement planning, risk management, cash flow, and debt management, employee benefits optimization, and estate planning.

- Facilitated client meetings to define financial planning goals, develop planning strategies, and provide performance measurement metrics and reporting.
- Performed extensive outreach and relationship development with internal and external stakeholders to facilitate client satisfaction and goal achievement.
- Directed daily financial operations including processing and posting payments, preparing bank deposits, and performing data entry and recordkeeping.

Brittany Davis and Company Memphis, TN

Freelance Financial Media Consultant Dec 2017 – Mar 2021

Brittany Davis & Co. is a hub of multi-media content regarding personal finance industry innovations including banking technology and automation to empower individuals with tools and education to achieve their financial goals.

- Empowered individuals by creating multimedia content on personal finance innovations, reaching over 10,000 listeners and fostering financial literacy.

- Positioned as an industry thought leader, featured in prominent publications, driving a 25% increase in website traffic and brand recognition.
- Developed and launched a personal finance basics course, with 500+ enrollments, equipping learners with practical tools for financial success.

Raymond James Memphis, TN

Fee-Based Senior Associate Mar 2020 – Jul 2020

Founded in 1962 and a public company since 1983, Raymond James Financial, Inc. is a Florida-based diversified holding company providing financial services to individuals, corporations and municipalities through its subsidiary companies engaged primarily in investment and financial planning, in addition to capital markets and asset management. The firm's stock is traded on the New York Stock Exchange (RJF).

- Facilitated seamless account operations by coordinating daily processes, resulting in 100% accuracy in account creation and terminations.
- Conducted in-depth research to resolve complex business and account issues, reducing resolution time by 25% and enhancing client satisfaction.

Regions Bank Memphis, TN

Financial Relationship Consultant Nov 2019 – Feb 2020

Regions Financial Corporation (NYSE:RF), with $144 billion in assets, is a member of the S&P 500 Index and is one of the nation's largest full-service providers of consumer and commercial banking, wealth management, and mortgage products and services. Regions serves customers across the South, Midwest and Texas, and through its subsidiary, Regions Bank, operates approximately 1,300 banking offices and 2,000 ATMs.

- Accelerated business growth by identifying client needs and offering tailored banking solutions, resulting in a 20% increase in new accounts.
- Provided ongoing customer education and support, cultivating long-lasting relationships and generating $50,000 in additional deposits.

EDUCATION

Columbia Engineering, *Product Manager Certification* Mar 2023
FINRA, *Investment Advisor/Representative (Series 65)* Oct 2021
AFCPE, *Accredited Financial Counselor* Aug 2020
Middle Tennessee State, *B.S., Organization Communication* Dec 2011

SKILLS

- **Technical:** Trello/Asana/Monday/Meistertask, Canva, Office, Excel, Google Analytics, Zendesk, CRM, Google Workspace, Salesforce, Hubspot, SQL, Jira
- **Strategy:** Cross Functional Team Support, Agile/Scrum/Kanban, User Stories, Innovation, Product Lifecycle, Work Breakdown Structure, Product Roadmap, Lean Startup, Qualitative & Quantitative Data Analysis, Stakeholder Management