

Nicole M. Gerrity
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Summary: LMS Technical Support professional with experience in client relations including training, problem solving and proactive support. Expertise includes MS Office, verbal & written communication skills.

Experience

Edvance360

2013 - Present

Senior Technical Support Specialist

Manage the technical support help desk

- Answer help tickets in a timely manner to maintain high customer satisfaction scores.
- Troubleshoot issues submitted by clients to assist development team in efficient resolution.
- Provide training to clients on use of system aiding in customer retention and reducing churn.
- Test new features to reduce bugs before release to clients.
- Manage chat tool for sales reducing the number of bounced inbound leads.
- Facilitate onboarding of new clients enabling them to go live without difficulty.
- Liaison between clients and 3rd party vendors
- Assist clients and their staff in transitioning from on ground to online instruction enhancing the clients' chance of success with the platform

Wells Fargo Advisors, Farmington, CT

2005-2013

Senior Registered Client Associate

Manage the daily operations for a team of financial advisors

- Recipient of the 2011 & 2012 Distinguished Service Professional Award
- Trained to perform duties of branch operations specialist in her absence
- Work directly with clients to open new accounts, perform account maintenance and correct any problems they may have
- Prepare projects for financial advisors to meet client needs
- Create portfolio analysis reports and asset allocation reports using financial software
- Direct liaison to back office personnel on behalf of financial advisors to deal with many issues ranging from marketing approvals to working with the legal department on court restricted accounts

Advest, Inc., Hartford, CT

2003-2005

Senior Registered Associate

2+ years experience working in a team environment focusing on managing the daily operations for a group of financial advisors.

- Utilized Series 65 in June 2004 in order to help brokers with managed money accounts
- Responsible for correcting trades for 20+ brokers
- Assisted 4 brokers with trading securities, opening new accounts, account transfers, account maintenance, client service and processing paperwork
- Managed calendar of meetings/events for 4 brokers
- Worked directly with the branch manager on making sure documents are signed and approved

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Fidelity Investments, Merrimack, NH
Service Trader II (2001-2002)

2000-2002

2+ years experience in client relations and business development focusing on trading mutual funds, stocks, bonds and options. Successful in problem solving and servicing client accounts.

- Transacted complex options and bonds with 100% accuracy
- Presented monthly trade dispute report that improved team trading accuracy
- Participated in testing new client database system while handling live customer service and trading inquiries
- Outstanding performance review in the areas of products, policies and procedures
- Exceeded department key measure performance standards
- Recognized for expertise as a tax representative during 2002 tax season

Service Trader (2001)

Traded stocks and mutual funds while providing quality customer service

- Traded stocks and mutual funds with 1 error in 639 trades
- Communicated new website features to team members

Associate Service Trader (2000-2001)

Customer service representative with focus on account maintenance and problem solving

- Obtained series 7 and 63 licensing in order to receive promotion to trader
- Quickly applied advanced Fidelity policies and procedures in customer interaction

Windham Center School, Windham, NH
Teacher, Grade 4

2000

Classroom teacher responsible for teaching Language Arts and Social Studies to 3 separate classes totaling 75 students.

- Prepared detailed daily lesson plans from generalized guidelines
- Calculated grades on a quarterly basis
- Attended weekly team teacher meetings

Danville Elementary School, Danville, NH
Teaching Assistant

1999-2000

Supported students in fourth and fifth grade classrooms in Computer Literacy, Math, and Reading/Language Arts in compliance with to teacher specifications

Previous Licensing: Series 7, 63 and 65

Education

Clemson University, Clemson SC
Bachelor of the Arts, Elementary Education

1999

Held teacher certifications in both New Hampshire and South Carolina