Nicole S. Dotson

13043 Chateau Ct. New Orleans, LA 70129 504-723-7424 nmsdotson18@gmail.com

PROFESSIONAL SUMMARY

Experienced Operations Associate with 15 years of financial services and hospitality industry experience bringing expertise in back-office functions. I possess excellent time management and analytical skills as well as being goal oriented with great communication skills.

EXPERIENCE

Operations Associate — October 2019 - Current
JECohen & Co. LLC | Place St. Charles Building | New Orleans, LA

- Handles the audit administrative functions to ensure all client paperwork is processed efficiently and timely to meet all compliance requirements.
- Validates clients plans based on documentation submitted and ensures timely submission.
- Reports unaccounted client transactions to the financial advisor and implements a plan of action proposed based on the client's concerns.
- Reviews and approves all new client account applications as well as maintain all existing accounts.
- Implemented the review and revision of all Standard Operating Procedures (SOP's) for new operational business processes to reduce errors and increase productivity.
- Involved in internal/external audits and client correspondence.

SKILLS

- Microsoft Office Suite
- QuickBooks
- Google Apps
- Bank Link/GFX Network
- SERV safe Certification
- Social Media Platform (Facebook, Twitter, Instagram, Snapchat, etc.)

EDUCATION

University of Phoenix — Metairie, La US — April 2011
Master of Business Administration

Xavier University of Louisiana — New Orleans, La US
Bachelor of Science - Business Administration — May 1997

John F. Kennedy Sr. High School — New Orleans, LA US
High School or equivalent / Honors Graduate — May 1991

ORGANIZATION

Order of Eastern Star
National Council of Negro Women
Robert Rules of Order Forum
New Kingdom Missionary Baptist Church Board of Trustee