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