GEORGE BLEDSOE
[redacted]

SUMMARY

Risk Management Professional with experience in wealth management, trust accounting and administration, and mutual fund industries. Key strengths include implementing process improvement; building interpersonal relationships; distinguished client service; and strong industry knowledge. Demonstrated ability to lead projects. Proactively resolves client disputes utilizing analytical communication style.

EDUCATION

AAS, Paralegal, Milwaukee Area Technical College, Milwaukee, WI
Law Studies, Marquette University, Milwaukee, WI (Attended 2012-2014)

PROFESSIONAL EXPERIENCE

NORTHWESTERN MUTUAL INVESTMENT SERVICES, Milwaukee, WI **2017 to Present**
Sr. Annuities Analyst
Competently performs market trading and maintenance for annuity accounts. Provides team support for financial representatives in the field ensuring a high level of product support, client service and dispute resolution.

- Holds Series 6 and Series 63 Insurance and Securities licenses.
- Manages senior analyst level workload, provides dispute resolutions and maintains relationships with internal and external clients.

NORTHWESTERN MUTUAL WEALTH MANAGEMENT CO., Milwaukee, WI 2012 to 2014
Trust Administrator Assistant
Competently assists Trust Administrators with designated and assumed responsibilities to administer Trust and ILIT accounts. Communicated with advisors and clients, proactively solves issues, while maintaining a high standard of service to clients.

- Manages account opening processes, account transfers, reconciliation of new accounts and ensures legal compliance.
- Maintains database for legal trust reviews, client online access, and performs court accounting projects for high net clients.

BMO HARRIS GLOBAL ASSET MANAGEMENT, Milwaukee, WI **2014 to 2017**
Common Trust Fund Accountant 2015 to 2017
Successfully provides daily trust accounting for assigned collective and unitized funds in compliance with generally accepted accounting principles. Ensures accuracy of fund valuations and fund accounting activity to minimize contingent liability to the company.

- Effectively reconciles dividends and capital gains for assigned funds to accurately price funds.
- Consistently executes trades and settles transactions while providing a clear reporting process for clients.

Investment Coordinator 2014 to 2015
Accurately monitors daily cash positions and activity flows within Commercial Trust and Institutional Trust. Responsible for raising/investing funds, initiating cash movements, overdraft investigation/resolution, and coordinating with multiple Trust Departments.

- Updates and maintains Daily Card instructions backup into the database for investment coordination team.
- Coordinates instructional card reviews to ensure accuracy and to maintain excellent service levels.

GODFREY & KAHN, S.C., Milwaukee, WI **2010 to 2011**
Trust Accountant
Balanced trust accounts. Researched and performed analysis for trust transactions. Accurately entered transactions and maintained proper cash management controls. Implemented various process improvements for a better client reporting system.

- Performed information gathering, fact finding, and analysis on projects to streamline processes and improve efficiency in the client reporting process.
- Adequately utilized various accounting and cash management software packages.

USBANCORP MUTUAL FUND SERVICES, Milwaukee, WI **2000 to 2009**
Operations Analyst 2007 to 2009
Executed institutional trades for over 100 mutual funds in a fast-paced trading environment. Acted as liaison between fund managers and institutional investors. Provided leadership on special project teams. Trained new employees on policies and procedures.

- Led implementation of new performance review process to conform with department objectives, improving visibility and accuracy of goals and results with upper management while increasing employee satisfaction.

Institutional Client Services Representative / Mutual Funds Specialist III 2000 to 2007
Executed purchases and redemptions of mutual funds. Established new accounts for individual clients, reviewed legal documents to ensure compliance, handled account maintenance, and executed trades. Serviced over 100 mutual funds.

- Recognized for maintaining a high degree of accuracy with institutional high dollar trading that resulted in a minimal loss.
- Collaborated with consultants on the implementation of a new mutual fund processing system, ensuring a smooth transition. Assisted management with employee training on system operations to expedite conversion, meeting launch ahead of schedule.

BMO HARRIS BANK (M&I Bank), Brookfield, WI **1999 to 2000**
EFT Specialist
Balanced accounts for ATM terminals, researched journals and discrepancies, transferred funds and initiated adjustments.
Oversaw fraud prevention efforts, resolved issues, and balanced general ledger accounts for bank branches.

- Led a reconciliation project to collect and disburse funds, decreasing liability and accounts receivable.
- Developed and implemented policies and procedures to standardize workflow, improving quality and consistency of service.

AFFILIATIONS

Chief Elections Official – Milwaukee Elections Commission
NAACP MKE Branch – First Vice President, Chair Political Action Committee
Chairman of the Board – Community Huddle
Former Board Member/Secretary of the Board of Trustees – First Unitarian Society of Milwaukee
African American - Employee Resource Group (AA-ERG) (NM)
Common Ground - Social Justice Organization
Fuel Milwaukee - Young Professionals Organization