

Jade Bloom

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EDUCATION

Master of Business Administration

May 2019

Stetson University, DeLand, FL
GPA: 3.7/4.0

Bachelor of Arts in Political Science

May 2014

Stetson University, DeLand, FL
Minor(s): Business Law, History
GPA: 3.0/4.0

LICENSES & CERTIFICATIONS

Licensed for Series 7 (General Securities Representative), Series 66 (Uniform Combined State Law Examination), and Series 31 (Futures Managed Funds Examination)

Licensed as Life Agent, including Annuities and Variable Contracts

PROFESSIONAL EXPERIENCE

Marketing Coordinator, Perryman & Associates, DeLand, FL

September 2016 – January 2017

- Coordinated all marketing efforts including print advertising, newsletters, and seminar development
- Developed customer relationship management database and tracking mechanism in consultation with senior management
- Served as internal sales coordinator and assisted external IT consultants resulting in increased sales volume

Financial Advisor, Morgan Stanley, Winter Park, FL

March 2015 – April 2016

- Achieved acting partner status in The Michles Group with \$130 million under management
- Provided professional investment management and served as an integral part of an existing senior wealth management team
- Became experienced in developing business and establishing long-term relationships with high net worth clients
- Responsible for extensive client development, prospecting, and consultative selling
- Collaborated daily with senior management in the acquisition and handling of new and existing clientele

Assistant Controller, Ayers Tire and Service LLC, Daytona Beach, FL

May 2014 – February 2015

- Served as acting assistant controller in Account Reconciliation Department
- Handled sales and financial reports for all corporate, retail, and wholesale locations
- Responsible for weekly payroll using ADP software for 30+ employees
- Managed gross profit and cash analysis using Excel and Access for all corporate locations
- Assisted and oversaw addition of regional corporate expansion including additional service locations

LEADERSHIP & INVOLVEMENT

Organizational Board for the 2016 Winter Park American Cancer Society Relay for Life
Winter Park Chamber of Commerce in 2015-2016

TECHNICAL SKILLS

MS Office (Excel, Word, PowerPoint, Publisher, and Access), Photoshop

Experienced with IT problem resolution related to networking, software integration, and hardware troubleshooting