

MICHAEL RUSSELL

MBA, CFP®

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FULL STACK DEVELOPER

Driven information technology professional with a financial services background and a proven track record of exceeding performance goals. Accomplished in solving complex problems and identifying opportunities to improve processes. Demonstrated ability in handling sensitive client and company financial information. Recognized by colleagues as an excellent communicator with a high-level of attention to detail.

TECHNICAL AND PROFESSIONAL SKILLS

Front End: HTML5, JavaScript, jQuery, jQueryUI, CSS3, Responsive/Mobile Web Development, Bootstrap, ReactJS

Middle Tier: C#.NET, ASP.NET, LINQ, MVC, EF, ASP.NET Web API

Back End: ADO.NET, SQL, SQL Server

Tools: Visual Studio, Visual Studio Code, SSMS

Professional Skills: Troubleshooting, Critical Thinking, Communication, Project Management Fundamentals, Teamwork, Pair Programming

PROFESSIONAL EXPERIENCE

CREATIVE PLANNING, INC., Overland Park, KS
Financial Planner

January 2021 - May 2021

- Researched and prepared complex financial plans for high-net-worth individuals
- Implemented and monitored plans while collaborating with internal experts in tax and legal
- Managed the accuracy of internal Client Relationship Management (CRM) software
- Regularly conducted client meetings as part of the financial planning process
- Monitored financial plans and investment strategies while also fulfilling various client requests

CREATIVE PLANNING, INC., Overland Park, KS
Senior Investment Manager - Team Manager

June 2015 - January 2021

- Assisted in developing, implementing, and monitoring investment strategies
- Regularly traded client accounts while identifying tax harvesting and rebalancing opportunities
- Communicated with clients the rationale behind trade activity and the relevance to their strategy
- Created new trading policies and procedures to be implemented department-wide
- Managed a team of 5 other highly trained Investment Managers

THE MUTUAL FUND STORE & SMART401k, Overland Park, KS
Investment Advisor/Trading Support Specialist

November 2011 - June 2015

- Trained Investment Advisors on how to properly utilize the company's trading platform
- Utilized webinars and other communication to educate and train over 145 Advisors
- Performed mutual fund and fixed income trading for a centralized service
- Member of a team tasked with developing and implementing new financial services
- Performed functions of an Investment Advisor for SMART401k, a Mutual Fund Store division

BOSTON FINANCIAL DATA SERVICES, Kansas City, MO
Senior Mutual Fund/Corporate Securities Representative

October 2009 – October 2011

- Assisted brokers, shareholders, and other individuals with varying requests via phone, email, and fax
- Executed trades, established investment accounts, and aided with the transfer of assets
- Provided expert assistance on both retirement vehicles and taxable accounts
- Member of specialized team chartered with resolving legal issues surrounding estates
- Trained new associates and resolved escalated issues from peers in a professional manner
- Worked in a demanding environment that on occasion required fielding over 100 calls per day

EDUCATION

Master of Business Administration, Baker University, Overland Park, KS, (GPA 3.9)

Bachelor of Science, Management Information Systems, Park University, Parkville, MO, (GPA 3.9)

Bachelor of Science, Business, Emporia State University, Emporia, KS, (GPA 3.6)

Full Stack Developer Program, Centriq, expected completion Oct. 2021

CERTIFICATIONS & HONORS

- CERTIFIED FINANCIAL PLANNER™ certification
- FINRA Series 65 license
- Soldier of the Month, March 2008, Operation Iraqi Freedom, Camp Bucca, Iraq
- Employee of the Month, August 2013, The Mutual Fund Store (for exceeding performance goals)