

Patrick Ryan Powell

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Work Experience

State Street Investment Servicing

(February 2017 – Present)

Client Operations Specialist, Associate II – Kansas City, MO

- Perform activities and fulfill ad-hoc requests from clients in conjunction with internal and external BUs
- Calculate daily NAV, utilizing Microsoft Excel, Access and Outlook to reconcile data between MCH, Bloomberg, Navigator and IMS in a timely manner
- Produce client-customized reporting, including the collection and consolidation of client data in compliance with regulatory institutions and escalating problems to Senior Team Members
- Maintain documentation of TRS Swap tickets, ledger balances and journal entries required for monthly and quarterly audits

Waddell & Reed Financial Services

(February 2016 - October 2016)

Customer Service Representative – Shawnee Mission, KS

- Completed the Series 6 certification and worked extensively with retirement and nonretirement investment vehicles including: Traditional, Roth, SEP and SIMPLE IRAs, TSAs, Qualified and 529 Plans
- Answered telephone inquiries from shareholders and advisors and provided solutions to complex problems on an account-by-account basis by utilizing internal resources
- Accommodated client requests by deescalating tense situations and making adjustments to accounts
- Processed transactions and researched shareholder accounts using DST's AWD and TA-2000 software

Key Bank Real Estate Capital

(Summer 2015)

Surveillance Intern - Overland Park, KS

- Monitored and evaluated the financial performance of income producing commercial properties that secure loans serviced by Key Bank
- Analyzed Operating Statements and Rent Rolls, noted changes in income, expenses, occupancy and client defaults and reported significant changes to management
- Researched and presented industries to invest in to grow the Loan Servicing and Asset Management department to \$150 billion by 2020

Education

Missouri State University

(August 2011 - December 2015)

Bachelor of Science, Finance

Provost Scholarship for Academic Excellence

Major: Finance Minor: Accounting GPA: 3.21

Extracurricular Activities

Kappa Sigma Fraternity

Alumni Relations Chair

(2015)

- Organized the 30th anniversary weekend activities and dinner by delegating tasks between members, alumni and outside organizations for the benefit of the fraternity

Assistant Grand Treasurer

(2014)

- Assisted in performing an audit due to embezzlement, assisted in creating and maintaining a budget

Fundraising and Philanthropy Chair

(2014)

- Coordinated an event raising over \$3,000 for the Wounded Warrior's Project

Executive Grand Scribe

(2013)

- Maintained weekly meeting minutes, assigned sober drivers and assisted in managing fraternal operations