Kendra Beauford

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Education

UNIVERSITY of New Mexico Albuquerque, NM
Bachelor of Science, Business Administration
Concentration in Finance and Information Systems

FINRA Registered, 2019
Securities Industry Essentials (SIE)
Investment Company and Variable Contracts (Series 6)
Series 7 & Series 63 in progress 2024
Certified Equity Professional (CEP) in Progress 2024

Experience

Carta New York City/ Hybrid
July 2022 – Present

Senior Customer Success Manager - Mid Market/ SMB

- Responsible for a book of business that consists of over 1200 strategic accounts, bringing in roughly $5.7 Million in ARR.
- Collaborates with executive leadership and strategy teams to analyze ARR trends and determine innovative ways to mitigate churn and contraction while growing ARR.
- Regularly negotiates contract renewals worth upwards of ~$50,000 each, ensuring that both the company and the client are happy with the outcome.
- Builds deep relationships with decision makers, becoming a trusted advisor for the assigned territory of mid-market and SMB clients. Delivering value by sharing best practices and acting as the voice of the customer internally.
- Achieves and exceeds monthly net dollar retention goals with a strategic focus on delivering a unique and superior client experience to large Mid- Market clients by driving product adoption and identifying upsell opportunities that create leverage for our customers' operations.
- Focuses on the health, retention, and growth of Carta customers through initiatives that drive product adoption and increase Annual Reoccurring Revenue.
- Fluent in cap table management processes while actively demonstrating how to manage the cap table to clients on a regular basis.
- Optimizes current operational processes related to customer account management ensuring that we serve our clients in the best way possible.

Sept. 2021 – July 2022

Market Operations Associate III

- Works very closely, daily, with legal, compliance, HR teams, and C-suite Executives as the lead project manager in charge of every stage of a tender offer (from planning to disbursement and everything in between).
- Analyzes equity plans for private companies in late/pre-IPO stage. This includes amending and processing grants, exercises (manual, ACH and cashless exercises), reviewing the plans for accuracy and ensuring that they are built correctly on the Carta platform.
- Manages multiple projects that all span over a timeline of 4 months, moving money in the amounts of $4MM to $1.5B at a time.
- Ensures accurate financial reporting by reconciling Capitalization Tables before and after the tender offer.
- Reviews and redlines tender offer legal documents like the Offer to Purchases, Contingent Exercise Notices, Letter of Transmittals, Paying Agent Agreements, Non-Disclosure Agreements, and seller legalese to ensure they align with how the Carta platform works.
- Provides coaching to global equity managers on how to use the platform, issue & process new equity awards (Common, Preferred, ISO, NSO, RSU, and RSA), and manage their cap table and stakeholders.
- Builds out the Carta platform using HTML code to ensure that each issuer has a personalized, custom tender offer experience.
- Works closely with our engineering team to fix platform bugs and consistently offers ways to improve our platform for the employee, company, and investor experience.
- Regularly conducts product demonstrations to companies ranging from 500-3,000 employees to show how the platform works and gather feedback on ways to improve the overall user experience while educating users on all things equity related.

Wells Fargo
Phoenix, AZ/ Remote

Executive Office Case Specialist II Feb. 2020 – Sept. 2021

- Prioritizes regulatory and legal policies to ensure that all lines of business are staying compliant while servicing customers.
- Analyzes P&L statements, ledgers, and collateral evaluations to support complaint resolution decisions.
- Incorporates investigation findings along with the opinion of legal and compliance into formal letters, communicating the enterprises' final decision on high value complaints.
- Specializes in Commercial Real Estate, Wholesale, and Small Business lending on the executive level.

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- Demonstrates the ability to solve problems under conditions of uncertainty and ambiguity while generating solutions to expertly handle obstacles.
- Thorough understanding of UDAAP, ECOA, TILA, FDCPA and similar regulations.
- Standardized the training program for the entire Enterprise Complaints Management Office.

Nationwide/ Nationwide Advisory Solutions Phoenix, AZ
Territory Consultant Feb. 2019- Feb. 2020

- Audited financial advisors' full book of business, running hypotheticals, annuity comparison and fund analysis, portfolio mapping and Morningstar reports.
- Exceeded defined sales goals and call quality requirements while traveling to manage the relationship with advisors in a defined territory.
- Strategized development of territory using proper placement of products and services offered, tailoring them to fit into an advisors' current book of business.

Merrill Lynch (Bank of America) Albuquerque, NM
Sr. Client Associate (FP) Jun. 2018- Feb. 2019

- Restructured back-office flow for multiple financial advisors while serving as the most frequent point of contact for our clients.
- Planned and executed client appreciation events, informational seminars, and prospecting activities.
- Developed strategic communication plans focused on growing the book of business and providing clients with consistent market updates along with informational tips to be utilized within portfolios.
- Monitored client portfolios while reporting Profit & Loss's, Required Minimum Distribution's, Net Present Values, and liquidity.
- Interviewed, trained, and lead a team of 4 other Client Associates.

Bank of America Albuquerque, NM
Customer Service Representative Feb. 2017- Jun. 2018

- Performed account related requests such as fund transfers, deposits and stop payments, while identifying credit, deposit and servicing processing needs of customers.
- Regulated vault access, managed ATM daily servicing, and continuously balanced cash drawers.

Northwestern Mutual Albuquerque, NM
Financial Representative Jan. 2016- Feb. 2017

- Developed individualized plans for clients to help meet their financial objectives while building, managing, and preserving their financial resources and wealth.

Leadership & Activities

Wells Fargo Phoenix, AZ
Learning & Development Subject Matter Expert (SME) Oct. 2020 – Sept 2021

- 1 of 3 SME's to work on project with a vast team of executive level individuals tasked with standardizing the training program for the entire Enterprise Complaints Management Office.
- Instrumental in the development and design of this program utilizing past complaints to construct case studies that have been dissected for training purposes.

Site Trainer for Legal and Compliance Engagement Apr. 2020 – Jan. 2021

- Cultivated 90-minute training session speaking about when, why, and how to engage legal and compliance
- Guided new hires through the process of working with the legal and regulatory team on complex attorney client privileged complaints.

Merrill Lynch Albuquerque, NM
Sr. Client Associate Jun. 2018 – Feb. 2019

- Constructed and published a comprehensive training program for future client associates.
- Executed the interviewing, hiring, and training of new client associates.

Skills & Interests

Technical Software: Salesforce, Carta, G-Suite, Excel, Outreach, Totango
Personal Strengths: High Value Project Management, Relationship Management, Equity Plans, Financial Analysis, Tender Offers, Financial Sales.
Interests: Traveling, Competitive Cheerleading and Gymnastics, Self-proclaimed foodie, Start-up culture