

# Valerie A. Lee, M.S.



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## SUMMARY

Commercial real estate and affordable housing professional with experience in leasing, resident services, property management (commercial and residential). Knowledgeable on CAM reconciliations, lease administration, Yardi, HUD, Tax Credit Specialist, Certified Occupancy Specialist, Section 8, recertifications (initial, annual, and interim), project based vouchers, housing choice vouchers, fair housing, LIHTC income limits, rent calculations, and landlord tenant issues.

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## PROFESSIONAL EXPERIENCE

### East Bay Asian Local Development Corporation

Oakland, CA

Commercial Property Administrator

June 2020 – May 2021

- Managed seven commercial properties, including rent collection, monitoring and preparing budgets, coordinating tenant build-outs, lease administration, quality assurance, and collaborating with vendors to maintain properties in good condition
- Supported the Associate Director with marketing, leasing, and financial management using Yardi, Salesforce, AirCRE, and SignNow

### JWilliams

Oakland, CA

Assistant Property Manager

September 2019 – May 2020

- Presented market-ready apartments and community tours to prospective residents
- Leased apartments and maintained resident functions by using Real Page and Yardi
- Managed and audited resident files, reviewed move-in files, collected rents, prepared and maintained leases, reviewed rent rolls, tracked lease expirations, created work orders, processed rental applications, monitored EIV compliance and waitlist compliance, resolved resident issues, and processed income recertification for Section 8 and Tax Credit properties using Yardi

### Charles Schwab & Co.

San Francisco, CA

Financial Consultant Partner

November 2014 – October 2018

- Generated new business development opportunities for Senior Financial Consultant
- Created and presented financial plans, portfolio reviews and investment recommendations
- Managed operational client paperwork including processing complex financial transactions

### Fidelity Investments

Walnut Creek, CA

Regional Relationship Manager

January 2014 – November 2014

- Ranked #1 nationwide for appointment generation with high-net-worth clients

- Strengthened relationships with high-net-worth clients (\$1 million+ in investible assets)

**Morgan Stanley**

Honolulu, HI

Financial Advisor

May 2012 – January 2014

- Ranked in the top 20% in nationwide cohort for assets under management
- Conducted discovery interviews with C-level executives to understand their financial goals
- Delivered sales presentations to companies with over \$1 million in investible assets

**Kaiser Permanente**

Oakland, CA

National Proposal Consultant

January 2009 – April 2012

- Designed marketing strategies and programs to strengthen relationships with clients
- Created dashboards and published results of key Request for Proposal performance indicators
- Developed and presented RFP process efficiency tools at regional conference

**Lumetra**

San Francisco, CA

Senior Marketing Communications Consultant

October 2007 – August 2008

- Created marketing and educational content for nursing homes, home health agencies and hospitals
- Developed and managed marketing communication programs for healthcare providers
- Led target audience research project on communication preferences among healthcare audiences

**Wells Fargo**

San Francisco, CA

**Marketing Consultant, Wells Fargo Financial Products**

August 2005 – October 2007

- Created positioning for new financial products with product teams across Wells Fargo footprint
- Developed and executed strategic marketing plans, collaborating with product and sales teams
- Created and implemented marketing communications, sales, and brand development strategies

**Project Manager, Wells Fargo Private Client Services (PCS)**

April 2004 – August 2005

- Helped create and implement new Wells Fargo PCS National Sales Advisory Desk
- Created, implemented, and executed first national PCS Wealth Management Conference
- Managed marketing and content development process for major Wells Fargo PCS initiatives

**Licensed Personal Banker, Wells Fargo Bank**

November 2003 – March 2004

- Sold financial, credit, mortgage, banking and investment products to retail and business clients
- Managed portfolios, serviced relationships, and cross-sold financial and banking products
- Identified investment, consumer, mortgage, and lending opportunities among retail clients

**EDUCATION**

- Certified Occupancy Specialist and Tax Credit Specialist, National Center for Housing Management
- Working on earning California salesperson real estate license (successfully completed Real Estate Principles, Legal Aspects of Real Estate and Real Estate Practice)
- Master of Science in Marketing (High Honors), Golden Gate University, San Francisco, CA
- Bachelor of Arts in English (minor in Journalism), Indiana University, Bloomington, IN