

GAIL PETERSON

gpeterson2105@gmail.com

312-266-2964

Accomplished administrative professional with extensive background in supporting senior level executives. Excellent skills, work ethic, follow-through and attention to detail. Creates fruitful working relationships with high net worth clients, trusted advisers and custodians. Maintains confidentiality when dealing with matters of a private and sensitive nature.

EXPERIENCE

ROBERT HALF FINANCIAL, Chicago, IL 2015-Present

Assignments included:

- Futures trading data entry.
- Reception.
- Client Service Specialist: Documents to transition client accounts to new firm, documents for client investments in private placements, database updates.

CONCORD ASSET MANAGEMENT, Chicago, IL 2000-2014

Administrative Assistant to Management Team (2007-2014)

Provided support to Portfolio Managers and Director of Client Services

- Cash requests for clients, correspondence, proxy voting, corporate actions, compliance documents, presentations for meetings, new account documents.
- Paperwork for block trades.
- Expenses, vendor contact, approve bills for payment.
- Reception relief.

Executive Assistant to President (2000 until retirement in 2007)

Provided support to executive in his dual roles as President of firm and Director of Sales and Marketing

- Administrative: Correspondence, expenses, calendar management.
- Sales and Marketing: Presentations for prospect meetings, speeches, articles, newsletter to trusted advisers.
- Events: Financial education program for high net worth individuals, seminar for trusted advisers, client appreciation meeting.
- Shareholder records, distributed dividends and tax information, correspondence, re-registration of certificates.
- Assisted clients with personal bill payment.

GOFEN AND GLOSSBERG, Chicago, IL 1995-2000

Executive Assistant to Portfolio Manager

- Cash requests for clients, correspondence, review client appraisals, billing, corporate actions, compliance documents.
- Extensive telephone contact with clients, accountants, attorneys and custodians.
- Established excellent working relationships with clients.

EDUCATION

Vermilion Community College, Ely, MN, Coursework and Certification in Office Administration program.

Harris S. Truman College, Chicago, IL, Coursework in Software/Technology instruction.

OTHER SKILLS

Proficient in Word, Excel, PowerPoint, Outlook, Advent-Axys, Know-It, Goldmine, Metronome.

Custodian-specific software: Pershing and Schwab.

Typing: 70+ wpm.