

# JERRY BENSON

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## OBJECTIVE

Practice Management in Behavioral Healthcare to apply more than 15 years business, management experience with MHA education to serve underserved populations.

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## Education

MHA, Pfeiffer University – (Expected Summer 2015)

MBA, Pfeiffer University – (Expected Summer 2016)

B.S.B.A. - Finance, University of North Carolina at Charlotte – May 1993

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## Professional Experience

### WELLS CAPITAL MANAGEMENT

#### AVP – Operations Analyst/Liaison Database Management

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- Management, Training development and execution, and team oversight.
- Initiate and coordinate projects with internal stakeholders in trading, accounting and risk management.
- Monitor error reports and conduct root cause analysis to correct irregularities.
- Evaluate current processes to identify inefficiencies to implement time saving solutions.

### MONARCH

#### Internship (12/14 – 1/15)

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*Process Improvement/Process Design Project – reporting to CEO:* Observed and documented the process flow of the Telemed portion of Open Access to identify inconsistencies to improve efficiency. Upon completion helped design a new process flow that will be implemented across the enterprise for Open Access.

### EVERGREEN INVESTMENTS

#### AVP - Assistant Fixed Income Trader

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- Effectively traded for portfolio managers on over 250 accounts valued at over \$12 billion.
- Negotiated with brokerage community for best prices and assistance with trade discrepancies.
- Cultivated relationships with a diverse group of strong personalities both internally and externally.
- Communicated with internal-external stakeholders on a high stress, fast paced trading floor.
- Monitored and expeditiously rectified trade fails to minimize losses.
- Reduced the error rate for money market and treasury settlements by 5% through proactive communication of account setup with custodial banks, brokers and traders.

### SOVEREIGN HOLDINGS, LLC

#### Supervisor – Operations & Customer Service

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- Hands-on operations manager for over 1,200 accounts with a market value over \$2 billion.
  - Supervised, hired and trained support personnel in settlements, trading & client reporting.
  - Point person for compliance issues pertaining to registration of personnel along with assisting in an onsite Securities and Exchange Commission (SEC) audit.
  - Main contact for client inquiries where clientele was company CEO, CFO or Fund Manager.
  - Successfully improved quarterly statement turn-around time from 2 weeks to 4 days using existing software capabilities.
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## SKILLS

Management/Leadership, Healthcare Financial Management, Project Management and Design/Improvement, Customer Service, Negotiations, Detail-Oriented, Critical Thinking, Strong Communication Style, MS Office, SQL, Access, Web-based Tools.