

Jiaihdi Turner, CMFC®

Product Manager-Client Directed Advisory at Wells Fargo Advisors

Experience

Product Manager-Client Directed Advisory at Wells Fargo Advisors

March 2014 - Present (1 year 10 months)

- Collaborate with compliance and branch supervision groups to ensure adherence to client-directed product's policies and procedures to mitigate risk. • Adresse advanced product questions from the field that were escalated from advisory operations. •Utilize back office systems such as BETA and SmartStation to research solutions to product concerns. •Use MS Access and Excel to independently aggregate, analyze and summarize large quantities of raw data into complex charts, graphs and pivot tables to present meaningful information to management in the form of MS PowerPoint presentations. •Participate in the new product review and approvals. •Demonstrate knowledge of investment products such as Mutual Funds, Exchange Traded Products, Unit Investment Trusts and Closed End Funds. •Subject matter expert in non-discretionary fee-based advisory products.

Sales Advisory Consultant at Wells Fargo Advisors

November 2012 - March 2014 (1 year 5 months)

- Provided primary sales support to the branches for all WFA offered mutual funds, 529s, advisory products/ separately managed accounts(SMAs), unit investment trusts, closed end funds and exchange traded products
- Assisted financial advisors with the selection of the most appropriate investment vehicle based upon the clients' investment objective. • Leveraged Beta/Thompson, InfoMAX and SmartStation to assist branches in the selection of the most appropriate marketing pieces (internal and/or external) and proposals.
- Coached financial advisors how to use analytical tools such as the Morningstar Advisor Workstation. • Collaborated with product teams, relationship managers, marketing, and communications to stay abreast of all modifications to all product lines in order to foster sales and identify cross selling opportunities. • Conducted Morningstar and advisory overview conference calls for various levels of branch associates.

Securities Operations Specialist at Wells Fargo Advisors

October 2010 - November 2012 (2 years 2 months)

- Used Beta to assist in the balancing and reconciliation of over \$5,000,000,000 in omnibus money market accounts. • Reconciled DTC and NSCC/CNS to Beta. • Streamlined the money market reconciliation process by critically evaluating the process and effectively collaborating other team members to implement the appropriate modifications. As a result of this effort, the time to complete the money market balancing and reconciliation process was reduced by 40%. • Used Wisdom system to review and suggest corrections to the reconciliation of suspense accounts.

Financial Advisor at Edward Jones

March 2008 - December 2009 (1 year 10 months)

- Customized financial planning strategies to clients needs based on their risk tolerances and investment objectives.
- Managed geographically dispersed offices in transition.
- Made outbound phone calls to existing and potential clients and presented to them financial solutions such as stock, bond, mutual fund, insurance and annuity products.
- Conducted appointments with existing and potential clients to review their portfolios and make financial solution recommendations aligned with their long term financial goals and risk tolerance.
- Executed all trades and transactions in accordance with client instructions and within industry and company guidelines.

Full-Time Preload Supervisor at UPS

August 2007 - November 2007 (4 months)

- Supervised a staff of 37 employees to ensure the processing of more than 13,000 packages daily
- Strategically worked with cross functional members of management to ensure the highest level of production rates and quality of service are achieved for internal and external customers
- Responsible for the accuracy of payroll, compliance training and safety for 37 employees
- Responsible for the operational training, developing, coaching and counseling of employees

Plant Engineering Supervisor at UPS

January 2006 - August 2007 (1 year 8 months)

- Maintained plant equipment for over 20 facilities(conveyors and the like.)
- Prepared maintenance cost plan including capital expenditures
- Performed environmental facility audits and building assessments
- Managed capital construction projects
- Prepared invitation to bid packages and construction contracts
- Conducted training workshops on Air dangerous goods
- Performed hazardous materials regulatory compliance review audits

Industrial Engineering Supervisor at UPS

February 2004 - January 2006 (2 years)

- Prepared Capital Budgeting analyses for building and facilities projects
- Projected volume and stop levels for package sorting operations
- Performed time studies on package car drivers' routes
- Conducted work measurement analysis on production capabilities of sorting operations
- Developed master operating plans for production sorts

Associate Engineer at Cargill Meat Solutions

August 2002 - January 2004 (1 year 6 months)

- Managed capital construction projects with project budgets of over one million dollars each
- Prepared invitation to bid packages and construction contracts
- Coordinated and scheduled meetings with contractors
- Supervised second shift maintenance employees
- Used Maximo to generate work orders and track maintenance tasks
- Updated facility plant drawings as needed.

Certifications

Chartered Mutual Fund Counselor

College for Financial Planning September 2013 to September 2017

Series 7

Financial Industry Regulatory Authority. May 2008

Series 66

Financial Industry Regulatory Authority. May 2008

Series 65

Financial Industry Regulatory Authority. April 2013

Insurance License - Life/Accident & Health/Life Variable Contract

Missouri Department of Insurance, Financial Institutions and Professional Registration July 2008 to July 2016

Education

Webster University

Master of Science (M.S.), Finance, 2012

University of Missouri-Columbia

Bachelor of Science (BS), Industrial Engineering, 2002

Hazelwood East High School

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[Contact Jiahdi on LinkedIn](#)