Riley Mitchell

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SUMMARY

Branch administration professional with four years supporting regulated **wealth management** offices, **financial advisors**, leaders, and support teams. Coordinates Accounts Payable invoices, vendors, expenses, meetings, travel, calendars, files, facilities, supplies, office utilization, technology requests, equipment replacements, and business continuity activities. Supports HR workflows covering **I 9 processing**, onboarding, transfers, termination paperwork, benefits, and personnel communications. Maintains registration tracking, licensing records, CPR and AED documentation, annual certifications, **market data expenses**, and confidential files with sound judgment. Works across finance, HR, technology, facilities, and advisory teams to resolve exceptions and keep priorities moving. Microsoft Office proficiency, client service, organization, adaptability, and careful follow through support dependable branch operations. Ready to pursue Series 7 and Series 66 licensing while contributing practical administrative support within a regulated financial services setting.

EXPERIENCE

Branch Operations Administrator — July 2024 - Present

Redwood Crest Financial Services — *Sacramento, California*

Supports daily administration for a regulated wealth management branch, coordinating advisor requests, office operations, records, vendors, technology needs, and cross functional service delivery. Provides practical backup coverage and status visibility for leadership while protecting confidential information and maintaining documented procedures.

- Prioritized advisor requests through documented workflows, helping branch leaders meet deadlines with fewer follow up issues.
- Coordinated vendor **invoices** and expense records, improving documentation quality for finance review and payment processing.
- Managed **calendars**, meetings, travel, files, supplies, and **facilities requests** across active branch operations.
- Tracked registration records, **annual certifications**, CPR and AED documentation, and **market data expenses** for compliance visibility.
- Resolved technology and equipment requests through clear handoffs, reducing delays during replacements and office changes.
- Supported onboarding, personnel updates, and confidential communications with HR partners using accurate source records.
- Updated **continuity checklists** and emergency notification details, giving staff clearer guidance during operational disruptions.

Administrative Coordinator — September 2022 - June 2024

Sierra Point Advisory Group — *Sacramento, California*

Coordinated administrative services for financial professionals and **support staff**, with responsibility for schedules, events, travel, expenses, records, facilities, personnel paperwork, and vendor communication. Balanced recurring work with urgent requests while maintaining discretion, accuracy, and responsive client service.

- Prepared meeting logistics, **travel** arrangements, event details, and calendar updates for financial professionals and leaders.
- Reviewed **Accounts Payable** invoices against supporting records, routing exceptions to vendors and finance for resolution.
- Organized confidential personnel files and assisted HR with I 9, onboarding, benefits, and **termination paperwork**.
- Maintained supply levels, **office utilization** records, facilities requests, and equipment replacement status for smooth operations.
- Created repeatable checklists for recurring requests, giving backup administrators clearer steps and handoff notes.
- Communicated with clients, advisors, **vendors**, and internal partners while protecting sensitive financial and personnel information.
- Tracked registration items and certification dates, helping leadership identify upcoming administrative deadlines before expiration.

PROJECTS

Branch Continuity Records 2025

Created a centralized continuity record for emergency contacts, notification steps, backup coverage, equipment details, and recurring administrative checks. Clearer records gave branch staff a calmer response during unexpected disruptions.

Advisor Expense Workflow 2024

Mapped invoice, vendor, travel, event, and market data expense steps into a practical review checklist. Finance partners received more complete documentation, and administrators gained a consistent path for exception handling.

LEADERSHIP & AWARDS

- Recognized by branch leadership for dependable follow through across urgent administrative requests and recurring office priorities.
- Selected by peers as a trusted backup for confidential records, schedule changes, vendor questions, and operational handoffs.
- Received role relevant continuing education recognition in 2026 for continued growth within regulated financial services administration.

EDUCATION

Bachelor of Science in Business Administration — 2022

California State University, Sacramento GPA: 3.5 — *Sacramento, California*

Coursework: *Business communication, financial management, human resources, operations management*

CERTIFICATIONS

- Role Relevant Continuing Education 2026
- Series 7 and Series 66 Licensing Preparation 2026

TECHNICAL SKILLS

- **Microsoft Office:** Microsoft Word, Microsoft Excel, Microsoft Outlook
- **Expense Administration:** Travel expenses, Event expenses, Market data expenses
- **Accounts Payable:** Invoice review, Vendor records, Payment routing
- **Human Resources Systems:** I 9 processing, Onboarding records, Benefits administration
- **Office Operations:** Facilities requests, Office utilization, Supply tracking
- **Scheduling Systems:** Microsoft Outlook Calendar, Meeting coordination, Travel calendars
- **Business Continuity:** Continuity checklists, Emergency notifications, Backup coverage
- **Registration Records:** Registration tracking, Annual certifications, Licensing records
- **Workplace Safety:** CPR certification records, AED certification records, Emergency procedures
- **Technology Support:** Equipment replacements, Technology projects, Technology request tracking
- **Document Management:** Confidential files, Status reporting, Procedure documentation
- **Financial Services Administration:** Wealth management operations, Financial advisor support, Branch administration

SKILLS

- Microsoft Office
- Expense management
- Accounts Payable
- HR onboarding
- I 9 processing
- Client service
- Vendor coordination
- Business continuity
- Registration tracking
- Travel coordination
- Facilities support
- Confidential records
- Calendar management
- Event coordination
- Prioritization

PROFESSIONAL AFFILIATIONS

- Member, Sacramento business administration community, with interest in practical service, responsible records, and local professional growth.
- Participant, continuing education activities focused on wealth management operations, workplace communication, and financial services administration.

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST