

Riley Mitchell

Branch Administrator

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STRENGTHS

- 🛠️ **Operational judgment**
When priorities changed quickly, reviewed source records first and gave leaders a clear next step without noise.
- 🔒 **Confidential service**
Handled personnel and financial records discreetly, earning trust from advisors, HR partners, and office leadership.
- 📋 **Workflow organization**
Built checklists and clearer handoffs for recurring requests, giving backup coverage a smoother starting point.
- 👥 **Cross team coordination**
Connected finance, HR, technology, facilities, vendors, and advisors so exceptions reached the right partner.
- ♥️ **Client focused support**
Responded with patience during busy periods, keeping communication practical and helping professionals stay focused on clients.

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

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

Redwood Crest Financial Services 📅 July 2024 - Present 📍 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

Sierra Point Advisory Group 📅 September 2022 - June 2024 📍 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.

Event coordination Prioritization

Spanish Intermediate

A donut chart with a light blue ring. The center is white and contains the text "3.9" in a large, bold, black font, with "YEARS" in a smaller, black font directly below it. The ring represents approximately 82% of a full circle.

- Administrative Coordinator at Sierra Point Advisory Group (1.8 Years)

- 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.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST