

Ngoc Ballard

Client Service Representative II

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SUMMARY

Dedicated Client Service Representative with five years in trading support. Experienced troubleshooting and resolving complex client issues, ensuring high quality of service. Passion for finance drives engagement with cross-functional teams, cultivating positive client interactions. Continuously enhancing skills through certifications like SIE and Series 7, demonstrating commitment to professional growth. Proficient in Python, SQL, C#, and comfortable regarding US Equities and Derivatives. Focused on delivering exceptional results in high-pressure environments, prioritizing efficient issue resolution and team collaboration.

EXPERIENCE

Trade Support Specialist

Dynamic Financial Services 📅 January 2022 - Present 📍 Houston, TX

Provides first and second-level support within a busy financial services setting. Actively engages with clients utilizing automated trading platforms, focusing on ensuring inquiry resolutions are timely and effective.

- Deliver first and second-level support for Automated Trading Platforms via various communication channels.
- Collaborate closely with developers on troubleshooting software bugs regarding algorithms.
- Conduct thorough quality assurance testing ensuring compliance with established operational standards.
- Facilitate onboarding processes for new clients, ensuring smooth transitions into systems.

Client Services Associate

NextGen Trading Solutions 📅 June 2020 - December 2021 📍 Dallas, TX

Delivered outstanding client support, focusing on enhancing customer satisfaction while managing multiple accounts. Worked with sales teams to refine service delivery process, contributing to an improved overall experience.

- Addressed client inquiries via phone, chat, and email, consistently improving satisfaction ratings.
- Partnered with sales departments to gather vital feedback for refining trading software services.
- Successfully managed multiple client accounts for timely processing of requests.
- Resolved technical issues effectively, reinforcing positive relationships with key clients.

Intern

Tech Innovations Group 📅 September 2019 - May 2020 📍 Austin, TX

Supported senior analysts by troubleshooting connectivity problems. Developed essential skills in leveraging technology to assist in the support of automated trading applications.

- Facilitated problem-solving efforts for client connection issues effectively.
- Provided assistance exploring full functionality of automated trading systems.
- Leveraged knowledge of SQL and Python for data analysis, assisting in reporting requirements.
- Tools utilized include platform integrations and technical documentation.

LEADERSHIP & AWARDS

- Top Performer Award - Dynamic Financial Services - 2023
- Exceeding Customer Satisfaction Recognition - NextGen Trading Solutions - 2021

EDUCATION

Bachelor's Degree in Finance

University of Texas at Austin 🎓 GPA: 3.8 📅 2019 📍 Austin, TX

Coursework: *Financial Analysis, Investment Strategies, Risk Management, Portfolio Management*

CERTIFICATIONS

- SIE License 📅 2026
- Series 3 License 📅 2026
- Series 7 License 📅 2026
- Series 63 License 📅 2026

TECHNICAL SKILLS

- **Programming Languages:** Python, C#, SQL
- **Technical Analysis Tools:** Bloomberg, Thomson Reuters, Eikon
- **Database Management:** MySQL, PostgreSQL, SQL Server
- **Client Management Software:** Salesforce, Zendesk, Freshdesk
- **Application Development Tools:** Git, JIRA, Visual Studio
- **Testing Frameworks:** JUnit, NUnit, Selenium
- **Communication Tools:** Slack, Teams, Zoom
- **Project Management Tools:** JIRA, Trello, Asana
- **Data Visualization Tools:** Tableau, Power BI, Looker
- **Risk Management Software:** RiskMetrics, Palisade, SAS

SKILLS

- SQL
- Python
- C#
- Client Support
- Troubleshooting
- Communication
- Time Management
- US Equities
- Derivatives
- Applications Support
- Integration
- Quality Assurance
- Trading Operations
- Automated Systems
- Account Management
- Trading Algorithms

PROFESSIONAL AFFILIATIONS

- Member - Financial Industry Regulatory Authority (FINRA)
- Volunteer Mentor - Local High School Business Programs

LANGUAGES

- English (Native)
- Spanish (Proficient)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST