



Ngoc Ballard

Client Service Representative II

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STRENGTHS

- Problem-Solving**
Thrives on tackling challenging client issues. Colleagues often turned for insights, showcasing capability.
- Technology Savvy**
Quickly adapts to new technologies, influencing workflow efficiency. Constantly learn tools and software best practices.
- Communication Skills**
Fosters open dialogue with clients & staff. Built trust through consistent updates and clear explanations.
- Adaptability**
Comfortable in fast-paced settings. Shift priorities operate smoothly, addressing emerging challenges effectively.
- Team Collaboration**
Promotes teamwork culture in delivering great client support. Known for leading collaborative problem-solving sessions.

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

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

LANGUAGES

English Native

Spanish Proficient

MY CAREER



● Trade Support Specialist at Dynamic Financial Services (4.4 Years)

● Client Services Associate at NextGen Trading Solutions (1.5 Years)

● Intern at Tech Innovations Group (8 Months)

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

PROFESSIONAL AFFILIATIONS

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

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST