



# 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

### 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*

Account Management

Trading Algorithms

## 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