



Athena Hart

Member of Custody Operations, Digital Assets

☎ (704) 555-6138 ✉ athena.hart@example.com

🌐 linkedin.com/example/athenahart 📍 Charlotte, NC 28202

STRENGTHS

- ✓ **Instruction Review**
Checked wallet details, authorities, and readiness before approval. Teams relied on clear records when requests became unusual.
- 🛡 **Risk Awareness**
Escalated incomplete instructions and unusual activity early. That habit gave compliance partners useful context for decisions.
- 💬 **Client Service**
Supported clients across chat, text, email, telephone, and video. A clear update often turned a tense request into progress.
- ⚙ **Workflow Improvement**
Used queue trends and exception themes to shape practical refinements. Small changes made repeat requests easier to manage.
- 👥 **Cross Team Delivery**
Coordinated with Product, Sales, Compliance, and Client Experience. Shared status details kept complex work moving.

SKILLS

Institutional Operations
Digital Asset Custody
Transaction Review AML
Operational Risk Blockchain
Crypto Economics Tokens
Staking Governance

SUMMARY

Custody operations professional with four years of experience supporting **institutional clients** across regulated financial services and digital asset workflows. Executes transaction intake, verification, review, approval, exception handling, and client communication with careful attention to accuracy, timing, AML requirements, and operational risk. Familiar with **custody products**, supported cryptocurrencies, tokens, protocols, staking, governance, **traditional financial products**, and institutional operating models. Uses Salesforce, Jira, and Looker to manage cases, report activity, analyze exceptions, and document decisions. Partners with **Client Experience**, Sales, Compliance, Product, and operations teams on complex requests, workflow rollouts, and service improvements. Communicates clearly across email, chat, text, telephone, and video, while supporting on call coverage and learning new systems quickly.

EXPERIENCE

Digital Asset Operations Associate

Meridian Institutional Services 📅 October 2024 - Present 📍 Charlotte, NC

Supports institutional **custody operations** across **transaction review**, wallet readiness, staking, governance, client service, risk escalation, reporting, and workflow rollout. Coordinates work with Client Experience, Compliance, Product, and Sales while maintaining clear records across Salesforce and Jira.

- Validated institutional wallet instructions and authorization evidence before custody transaction approval.
- Resolved **staking** and **governance** questions through clear token specific client guidance.
- Escalated unusual activity, incomplete instructions, and policy exceptions using AML risk controls.
- Tracked operational cases in **Salesforce** and Jira with complete decision records.
- Analyzed Looker queue trends and presented exception findings for workflow refinement.
- Coordinated product rollouts and evening or **weekend on call** coverage across partner teams.

Institutional Client Operations Analyst

Crescent Capital Operations 📅 September 2022 - September 2024 📍 Raleigh, NC

Managed institutional account instructions and service activity within a regulated financial operations environment. Applied investment product knowledge, documented controls, AML follow ups, and workflow testing to support professional investment clients and improve operational consistency.

- Processed institutional transaction requests under documented controls and readiness requirements.
- Verified account authority details and resolved discrepancies before processing client instructions.
- Answered investment **product** questions by applying institutional workflow and traditional finance knowledge.
- Maintained Salesforce service records across **telephone**, email, **chat**, and video channels.
- Supported **AML** documentation and client due diligence follow ups with **compliance** partners.
- Tested revised workflows, documented edge cases, and presented recurring service issues.

PROJECTS

Institutional Transaction Readiness Workflow 📅 2024

Mapped instruction review steps, authority checks, exception handling, and status updates into a repeatable operational workflow. Findings supported clearer handoffs and more consistent client communication.

Digital Asset Service Reporting 📅 2025

[Traditional Finance](#) [Salesforce](#)

[Jira](#) [Looker](#) [Client Support](#)

LANGUAGES

English Native

Spanish Intermediate

MY CAREER



● Digital Asset Operations
Associate at Meridian
Institutional Services (1.9 Years)

● Institutional Client
Operations Analyst at Crescent
Capital Operations (2 Years)

Reviewed custody queue activity and exception themes in Looker. Reporting helped teams spot recurring requests, focus workflow discussions, and prepare practical operational presentations.

LEADERSHIP & AWARDS

- Recognized by operations leadership for dependable institutional transaction review and clear risk escalation.
- Selected to present recurring service issues and workflow findings during operational review sessions.
- Trusted by peers for practical guidance on custody, staking, governance, and client instruction readiness.

EDUCATION

Bachelor's Degree in Finance

University of North Carolina at Charlotte 🎓 GPA: 3.5 📅 2022 📍 Charlotte, NC

Coursework: Financial Markets, Investment Analysis, Risk Management, Corporate Finance

CERTIFICATIONS

- Chainalysis Cryptocurrency Fundamentals Certification 📅 2025
- ACAMS AML Foundations Certificate 📅 2024

TECHNICAL SKILLS

- **Custody Operations:** Transaction review, wallet verification, authorization controls
- **Digital Assets:** Cryptocurrencies, tokens, crypto economics
- **Blockchain Protocols:** Protocols, staking, governance
- **AML Compliance:** AML requirements, client due diligence, risk escalation
- **Financial Products:** Investment products, traditional finance, investment strategies
- **Case Management:** Salesforce, Jira, status tracking
- **Data Reporting:** Looker, queue analysis, exception reporting
- **Client Communication:** Email, chat, telephone
- **Service Channels:** Text messaging, video conferencing, client updates
- **Workflow Delivery:** Process improvement, workflow testing, product rollouts
- **Institutional Models:** Venture capital, sovereign wealth, private equity
- **Operational Controls:** Instruction verification, readiness checks, decision records

PROFESSIONAL AFFILIATIONS

- ACAMS member, connecting with AML practitioners and regulated financial operations peers.
- Digital asset operations community participant, sharing practical perspectives on custody workflows and token activity.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST