

CHAD NEILSEN, CEP

My contact details are available upon request.

EXPERIENCE

MORGAN STANLEY

Associate Vice President

SANDY, UT

October 2020 - Present

- Details are available upon request.

E*TRADE CORPORATE SERVICES

Senior Client Service Manager

SANDY, UT

September 2017 – October 2020

- Provided stock plan administration services for a clients with large global equity compensation programs
- Cooperated with finance, corporate counsel, and HR to implement stock administration processes
- Oversaw processing of the ESPP, stock option exercises, and RSU vesting events for 110k+ employees
- Leveraged VBA language skills to create macros in Excel to increase efficiency in report reconciliation
- Designed global treasury reconciliation reporting process to assist 25+ international payroll groups
- Took ownership for several ad hoc projects aimed at improving year-end reconciliation reporting
- Partnered with E*TRADE's product team to provide custom ESPP and payroll reporting solutions
- Developed solutions to regional administration challenges in France, China, Vietnam, and Israel
- Developed reputation of exceeding expectations and finding creative solutions to difficult problems

FIDELITY INVESTMENTS

Stock Plan Associate & Business Analyst

SALT LAKE CITY, UT

April 2013 – August 2017

- Selected by senior director to join business analysis team to develop and research new technologies
- Led team of seven Jr. Business Analysts in several ad hoc research projects to improve processes
- Communicated with leaders at all levels of Fidelity to gain project information and support
- Developed PowerPoint decks and Excel spreadsheets to present findings to executive leadership
- Ran SQL queries to pull specific information from large databases for various research projects
- Frequently earned "Team MVP" and "Excellence in Action" awards for leadership and teamwork

GPS CAPITAL MARKETS

FX Sales & Trading Associate

SOUTH JORDAN, UT

April 2012 - December 2012

- Provided treasury management services via fast and secure foreign currency payment processing
- Performed cost-benefit analyses for companies conducting business in foreign exchange markets
- Partnered with the trade desk to complete foreign exchange spot trades for commercial clients

UTAH COMMUNITY CREDIT UNION

Loan Officer & Business Account Specialist

PROVO, UT

August 2008 - April 2012

- Analyzed key data provided by credit reports, provided lending recommendations
- Contributed to the highest producing sales team within Utah Community Credit Union
- Audited and organized all commercial and consumer account and loan documents

EDUCATION

UTAH VALLEY UNIVERSITY | WOODBURY SCHOOL OF BUSINESS

Bachelor of Science, Finance

- Overall GPA: 3.66

SKILLS & ADDITIONAL INFORMATION

- Known for advanced skill/knowledge of Windows, Microsoft Office, and particularly Excel
- Developed coding ability to write simple scripts/macros in AutoHotkey to complete mundane tasks
- Reputation of excellent verbal and written communication skills with an ability to present research
- Analytically talented with an ability to extrapolate insights from data and find solutions to problems
- Innate ability to quickly master new tasks and accomplish goals with little guidance or supervision
- Certified Equity Professional