

# CHAD NEILSEN

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## EXPERIENCE

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### **E\*TRADE CORPORATE SERVICES**

**SANDY, UT**

*Associate (Stock Plans) Service Manager*

September 2017 - Present

- Developed retirement eligibility tool to improve business offering and win clients, namely Intuit
- Administered equity compensation plans, including ESPP, stock option exercises and RSUs releases
- Provided general stock plan administration support for several multinational publicly traded companies
- Leveraged Excel VBA/Marcos to improve internal processes by reducing risks and increasing efficiency
- Took ownership for several ad hoc projects aimed at improving annual reconciliation reporting
- Maintained exceptional record of accuracy in daily, weekly, and monthly tasks and responsibilities

### **FIDELITY INVESTMENTS**

**SALT LAKE CITY, UT**

*Stock Plan Services Associate & Jr. Business Analyst*

April 2013 – August 2017

- Selected by senior director to join business analysis team to test 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
- Educated high-value stock plan participants on all aspects of their employee equity compensation
- Provided support to international participants regarding international tax withholding and reporting
- Assisted with complex trading and transaction needs where accuracy and effectiveness are critical
- Frequently earned “Team MVP” and “Excellence in Action” awards for leadership and teamwork

### **GPS CAPITAL MARKETS**

**SOUTH JORDAN, UT**

*FX Sales & Trading Associate*

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**

**PROVO, UT**

*Loan Officer & Business Account Specialist*

August 2008 - April 2012

- Analyzed key data provided by credit reports, provided lending recommendations
- Audited and organized all commercial and consumer account and loan documents

### **ABBOTT, STRINGHAM & LYNCH**

**SAN JOSE, CA**

*Emerging Business Market Analyst Intern (Remote)*

August 2011 - December 2011

- Contacted founders and executives of several start-up tech-companies in Silicon Valley
- Researched and discovered key challenges faced by the executive management team

## EDUCATION

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### **UTAH VALLEY UNIVERSITY | WOODBURY SCHOOL OF BUSINESS**

Bachelor of Science, Finance

- Overall GPA: 3.66

## SKILLS & ADDITIONAL INFORMATION

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- CEP Level II – Taking Level II in November
- FINRA Series 7 License & FINRA Series 63 License
- Known for advanced skill/knowledge of Windows, Microsoft Office, and particularly Excel
- 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
- Naturally curious and inquisitive about the world at large and how businesses and markets interact