SOFIA RAMIREZ

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SUMMARY

Operations associate with over a year at a $3.2B wealth management firm in Chicago, following a deposit operations internship at a community bank. Handles trade settlement, account reconciliation and client onboarding paperwork, and builds daily exception reports in Microsoft Excel. Known for attention to detail and good time management around market deadlines.

SKILLS

- Trade Settlement
- Account Reconciliation
- Client Onboarding
- Data Entry
- Microsoft Excel
- Microsoft Office
- Outlook
- Customer Service
- Attention to Detail
- Time Management

CERTIFICATES

Securities Industry Essentials (SIE) Exam

FINRA • 09/2025

EXPERIENCE

Operations Associate

Lakeshore Asset Management • Chicago, IL

07/2025 - Present

Registered investment adviser serving 2,400 households.

- Complete trade settlement for **200+** stock, bond and fund trades a day with 2 custodians before the 4 p.m. close.
- Run daily account reconciliation for 6,500 accounts, resolving cash and position differences within 1 business day.
- Process client onboarding packets for 35 new accounts a month, catching missing signatures and tax forms before custodian review.
- Respond to advisor and customer service requests in the shared Outlook inbox, closing 90% of them within 24 hours.

Operations Intern

Prairie Street Savings Bank • Chicago, IL

06/2024 - 08/2024

Summer internship in the deposit operations department.

- Reviewed **1,500** new deposit account files for missing data entry, signature cards and identity documents.
- Built a Microsoft Excel tracker for 90 returned checks a week that the team kept using after the internship.
- Indexed 4,000 archived loan documents in the imaging system to answer an external audit request on time.
- Compiled weekly overdraft reports for 2 branch managers using Microsoft Office templates and core banking data.

EDUCATION

Bachelor of Business Administration

Loyola University Chicago • Chicago, IL • 05/2025

Finance