

Deric Wynn
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Work Experience

Merrill Lynch Financial
Supervisor Client Account Services (CAS)
1995-1999

Responsible for supervising up to 40 Account Service Representatives and 4 assistant supervisors, motivate, train and review performance of Account Service Representatives. Monitor performance to ensure compliance with procedures. Supervise the Client Service Center's day-to-day operations. This included obtaining feedback from 60 Field Service Managers and up to 600 Administrative Assistants regarding the department's employee performance. Assist branch office personnel in operating and maintaining accounts. Act as a liaison between Denver Legal Advisory and the branch offices. Interpret complex documentation and make determination based on firm policy. Respond to elevated telephone inquiries and resolve processing issues. Lead and participate in special projects as required. Work closely with a variety of other departments such as Human Resources regarding "diversity issues" and personnel problems, including implementation of the Americans with Disabilities Act and title VII. Manage employee scheduling and overtime to make sure the department operates within budget. Worked to build effective and efficient teams and designed to better service client needs. Assist department employees in realizing their potential by helping them improve their communication skills related to the customer service operation. Monitor and maintain the daily operations and cost of department operating expenses.

Merrill Lynch Financial
Quality/Integrations
1993-1995

I was responsible for facilitating process improvement teams and implementing quality initiatives. Preparing and gaining approval on new policies and procedural changes as they pertain to Client Account Services. Writing business proposals and acting as Team Leader to assist team members in the development and presentation of their action plans, gaining departmental manager approval on all initiatives and assisting in the coordination and movement of over 1300 employees from the Lakewood campus to the new location at Meridian. Preparing cost benefit analyses, procedural and policy memos and obtaining approvals by Management.

***Merrill Lynch Financial
Broker Transfer
1991-1993***

Responsible for maintaining and transferring monies, mutual funds, stocks, CD's, Retirement Accounts and Trade Transactions for Merrill Lynch clients located in branch offices operating out of North Dakota, South Dakota, Nebraska, Oklahoma, Texas, Montana, Wyoming, Colorado, New Mexico and Arizona. I would ensure client accounts were transferred in its entirety from another brokerage firm into the client's newly opened Merrill Lynch Accounts.

Financial Education

Denver Financial Institute Englewood, Colorado
Received Series 7, Series 63 Broker Trading License

Merrill Lynch Financial, Englewood, Colorado
Completed a variety of courses in leadership, management, communications, conflict management, human resources, team building and computer usage.