

BRIAN M. WALSH

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OBJECTIVE

Seeking a position in finance or accounting at an organization in the Kansas City area that offers challenging tasks, ample incentives, and opportunity to contribute to its growth and productivity.

PROFESSIONAL EXPERIENCE

NorthStar Financial Services Group LLC., Omaha, Nebraska

Financial Specialist at Constellation Trust Company, January 2015 – Current

- Facilitate incoming and outgoing financial transactions via ACAT and non-ACAT Systems
- Prepare financial claims for annuity companies
- Process client distributions including required minimum distributions
- Performed cost basis reporting for 2017 tax year
- Aided in the implementation of new Salesforce portal through testing while providing valuable feedback on its efficiency
- Elected to represent Constellation Trust Company at a national conference in Miami

Mutual of Omaha, Omaha, Nebraska

Temporary Data Analyst, August 2014 – October 2014

- Analyzed and reviewed insurance claims
- Reviewed clients' financial transactions
- Initiated payment or denial of claims

Walsh Law PC, Omaha, Nebraska

Legal Assistant, January 2013 – June 2014

- Received and deposited payments from debtors
- Created bi-monthly remittance spreadsheets for collection agencies
- Drafted and reviewed legal briefs, correspondence, pleadings, and other legal documents

EDUCATION

University of Nebraska – Lincoln

Bachelor of Science in Business Administration

Major: Business Administration

Graduated December 2012

COMPUTER SKILLS

- Experienced in Microsoft Excel, Microsoft Word, Microsoft Office, Microsoft PowerPoint, Salesforce, and Quickbooks.

ACTIVITIES

Monster Mash 5k Run Volunteer, 2016

Volunteer at Sienna Francis House, 2014

Assistant Math Tutor at University of Nebraska, 2008