

STACEY MISHLER

SUMMARY OF QUALIFICATIONS

Through my career experience and education I have many excellent qualifications to match your current needs.

- Budgeting, forecasting, and financial analysis
- Financial reporting, auditing and reconciliation
- Creative problem solving and the ability to think outside the box
- Written and oral communication

WORK EXPERIENCE

April, 2015 – present Ridgeline Wealth Advisors, LLC Port Angeles, WA
President

- Own and operate financial services company offering the following services:
 - Cash flow management plans
 - Life and health insurance
 - Budgeting and retirement workshops
- Registered Investment Advisor (RIA) registered in Washington State

February, 2008 – April, 2015 Hallett & Associates Port Angeles, WA
Director of Operations

- Analyze business practices to develop procedures to maximize efficiency and reduce costs associated with all support staff.
- Create and implement records management procedures to comply with SEC regulations and facilitate office usage of electronic and paper records.
- Assist with research, reporting and transactions for client accounts.

2004 - Present Self Employed Port Angeles, WA
Business Planning, Bookkeeping and Transcription

- Created a thriving transcription company using strategic planning, grassroots marketing, and dedication to exceeding client and staff goals.
- Developed a business planning kit that includes step-by-step instructions and ideas for writing a business plan and an excel workbook with imbedded calculations for creating financial projections and analysis.
- Expanded my business to include bookkeeping services specializing in small business accounts and personal bank reconciliations.

January 2006 - August 2006 West Winds Counseling Prescott, AZ
Office Manager

- Complete administrative duties including file maintenance, payroll, state and federal billing, and other administrative duties as required.

2002 - 2004 Key Bank Olympia, WA

Key Client Relations Leader

- Used creative teambuilding strategies to build a cohesive team and a positive work environment.
- Led staff to win contests and exceed goals in sales, customer satisfaction, and deposit balance growth.
- Conducted compliance audits and re-training to ensure branch met corporate and federal regulations.
- Investigated and resolved customer issues including fraud, identity theft, transaction discrepancies, and product matching.

1999 - 2000 Sheraton Tucson Hotel & Suites Tucson, AZ

Director of Revenue Management

- Analyzed market trends and revenue sources for revenue maximization.
- Developed new procedures to improve accuracy and consistency for cancellation and attrition billing.
- Managed the reservations team and served as an intermediary between the hotel and off-site reservations teams.
- Key operator for training and implementation of a new computer system.

1997 - 1999 DoubleTree Guest Suites Tucson Tucson, AZ

Revenue Manager

- Worked with the sales team to increase year over year room revenue by \$190,000 in a soft market by July 1999.
- Implemented new selling strategies based on market analysis and revenue tracking for revenue maximization.
- Created and presented the 1999 rooms revenue budget.
- Introduced the sales staff to revenue management strategies utilizing reports I developed specifically for this hotel.

EDUCATION

2010 – 2013 Benedictine University Lisle, IL

Masters in Business Administration

- Financial Management & Accounting

1990 – 1996 University of Washington Seattle, WA

Bachelor of Arts

- Psychology

Continuing Education

- 2009 Registered Paraplanner Designee – College for Financial Planning
- 2003 Situational Leadership – Key Bank
- 1999 Revenue Management Training – Thayer Lodging