

SAM SMITH

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SEASONED FINANCIAL AID PROFESSIONAL

Financial Auditing & Analysis/Strategic Leadership & Collaboration/System Implementation & Enhancement

EXECUTIVE SUMMARY

An innovative, compliance-driven, and solutions-focused Financial Aid Professional with a 10-year career demonstrating progressive experience and outstanding performance in the financial guidance, support, and management of multi-site operations. Forward-thinking leader and enterprising problem-solver with tactical foresight and verifiable success identifying and capitalizing on growth opportunities, improving bottom-line performance, and optimizing organizational efficiency, productivity, and profitability through delivery of value-added systems, programs, and procedures. Articulate communicator and effective trainer with a direct and decisive management style that focuses on matrix teamwork and clearly defined mission and values for buy-in of all levels. Superior interpersonal, organizational, analytical, and critical-thinking skills with an innate ability to work in unison with students, staff, and key internal/external stakeholders.

CORE COMPETENCIES

- *Strategic Planning/Leadership*
- *Program Design & Execution*
- *Policy Formation/Deployment*
- *Team-Building & Coaching*
- *Forecasting/Reporting/Analysis*
- *Staff Supervision & Training*
- *Systems Creation/Enhancement*
- *Data Administration/Reporting*
- *Statistical Research/Analysis*
- *Auditing/Assessment/Review*
- *Process Innovation/Optimization*
- *Project Planning/Implementation*
- *Federal/Corporate Compliance*
- *Group Collaboration/Facilitation*
- *Financial Eligibility Verification*

EDUCATION

Master of Arts in Community Psychology - Martin University, Indianapolis, Indiana; Graduated: May 2009

Bachelor of Arts in Psychology - Bowling Green State University, Bowling Green, Ohio; Graduated: December 2005

PROFESSIONAL EXPERIENCE

ABC University **Any Town, USA** **Aug. 2011 - Present**
Financial Aid Advisor

Served as the primary contact for students with financial aid-related questions; counseled incoming and current students on financial aid resources and collected information to verify financial aid eligibility.

- Tracked financial documents in the student information system; packaged financial aid for new and continuing students and processed and mailed award letters.
- Presented financial aid information on Admitted Student and Open House days.
- Attended Financial Aid Workshops to remain up-to-date/current on industry information.

Selected Accomplishments:

- 100% of students packaged within two (2) weeks of semester start.

ABC University **Any Town, USA** **Dec. 2010 - Jun. 2011**
Regional Director of Financial Aid

Directed a multi-location financial aid team of seven (7) across three (3) campuses located throughout the state for an institute dedicated to delivering high-quality, career-focused training programs in Information Technology, Medical, Dental, Digital Media, Programming, and Oracle.

- Employed new policies and protocols as needed; addressed, updated, and enhanced existing procedures.
- Assisted in the internal auditing completion and clean-up of all three (3) campuses; collaborated closely with Campus Directors and corporate staff on campus issues.
- Reviewed funding received for timely processing each month; located eligible funds not disbursed.
- Provided training for new and current staff.
- Led National Financial Aid Administrators; called on as needed for Corporate Director of Financial Aid by all Any Town and Any State campus staff.

Selected Accomplishments:

- Attained 85% or above cash received for two (2) consecutive months at all Any Town campuses, February and March 2011.

PROFESSIONAL EXPERIENCE (CONTINUED)

ABC University

Any Town, USA

Mar. 2009 - Sept. 2010

Director of Finance

Spearheaded a staff of up to eleven (11) including eight (8) Student Finance staffers, two (2) Campus Student Loan Specialists, and one (1) Student Accounts Specialist at a campus providing students with short-term career training in a variety of popular programs.

- Utilized Situational Behavioral Leadership to effectively manage and coach the team; swiftly resolved any employee concerns.
- Assessed departmental challenges; enacted new procedures for improved efficiency.
- Provided continuous training to staff regarding corporate and federal goals, policies, and best practices.
- Maintained compliance with Federal Regulations and Company policies within all departmental and interdepartmental functions.
- Audited new student files for accuracy and compliance, and drop calculations for accuracy of return of funds and ledger balances monthly.
- Verified student eligibility prior to and after release of FFEL/DL and Pell disbursements.
- Met company metrics for Bad Debt, A/R Days, Potential Late Refunds, and other functions as related to Federal Regulations and company objectives and goals.
- Partnered with Admissions to enroll students into the Medical Assisting Program; enforced timely first and second appointments.
- Ensured that students entering school each month were packed by Student Finance in under thirty (30) days for timely receipt of eligible funds and lower A/R days.
- Collaborated with the Education Department to reenroll dropped students.
- Complete SOX audits monthly; generated high-balance reports weekly.

Selected Accomplishments:

- Earned performance-based bonuses Q2 and Q4, 2010; received year-end bonus for 2010.
- Successfully passed the company internal audit, March 2010.
- Consistently passed SOX audits, with less than 1 exception for samples of 25, or less than 2 exceptions for expanded samples of 40; on a monthly basis.
- Significantly lowered bad debt within company metrics of 7%.
- Reduced lapsed days from 36% to fewer than 5%.

ABC University

Any Town, USA

Jul. 2007 - Mar. 2009

Associate Director of Financial Aid

Supervised day-to-day operations of the financial aid function of a private, not-for-profit, liberal arts institution.

- Presented financial aid options and processes to students; facilitated Entrance and Exit counseling as needed.
- Packaged eligible students for financial aid based on valid ISIR information; verified students selected by the Central Processing Unit of FSA or those with ISIRs to identify conflicting information.
- Provided quality control and assurance for all office procedures including student financial aid awards for accuracy of federal and office guidelines.
- Monitored Satisfactory Academic Progress of all students; complied with the Department of Education policies.
- Assisted the Director of Financial Aid in federal aid processes such as the FISAP.
- Trained counselors on new or updated regulations and procedures.
- Created forms, training materials, databases, and consumer information as needed.
- Calculated the return of funds to the Department of Education when a student became un-enrolled.
- Certified FFEL Stafford Loans via an online process; reconciled state grant funds awarded to eligible students, determined part-time state grant awards, and administered state scholarship funds.
- Communicated with University Offices regarding student account issues.
- Actively participated in a variety of committees as needed.

Selected Accomplishments:

- Promoted from Assistant Director to Associate Director, October 2007.
- Created a default database to track and communicate with students in danger of defaulting on their student loans to aid keeping the school within an acceptable CDR as prescribed by the DOE.
- Developed a R2T4 Communication Form; improved the communication between Financial Administrators and the Bursar for timely return of ineligible aid for dropped students.
- Designed a new scholarship award application and database.
- Continuously maximized office efficiency, productivity, and performance.

PROFESSIONAL EXPERIENCE (CONTINUED)

ABC University

Any Town, USA

Sept. 2006 - Jun. 2007

Financial Aid Administrator

Performed essential administrative functions in all areas of financial aid for a reputable provider of outstanding training and continuing education in massage therapy and allied fields.

- Informed students of financial aid options and processes through personal counseling.
- Packaged eligible students for financial aid based on valid ISIR information; verified students selected by the Central Processing Unit of FSA or those with ISIRs indicating conflicting information.
- Determined a student's eligibility for professional judgment based on federal guidelines and proper documentation on a case-by-case basis.
- Administered Entrance and Exit counseling sessions for all Stafford loan recipients.
- Certified FFEL Stafford Loan promissory notes via paper and/or through an online process.
- Calculated the return of funds to the Department of Education following a student's withdrawal.
- Notified students and student accounts' personnel of financial aid awards and disbursements in a timely manner.
- Ensured and enforced compliance with the School's and Department of Education policies and procedures.
- Created and maintained files.
- Retained proper documentation for all financial aid record keeping; generated accurate quarterly mandated reports through ICES and other systems.
- Completed Enrollment Verification reports required by the Department of Education and lenders through a third party servicer or NSLDS.

Selected Accomplishments:

- Completed the first FISAP for the school which was approved for SEOG.
- Consistently passed all audits.

ABC University

Any Town, USA

Dec. 2001 - Dec. 2005

Student Express Counselor II - Financial Aid Office

Provided accurate information regarding financial aid options to parents and students in-office as well as via telephone and email at a campus with upwards of 20,000 students offering more than 200 undergraduate majors and programs.

- Answered an average of sixty (60) calls and twenty (20) in-office inquiries daily.
- Supported the Orientation and Registration program during the summer period; navigated approximately 300+ parents and students through the financial aid processes while they transitioned into the University.
- Complied with federal privacy guidelines; preserved the confidentiality of patron account information.
- Collaborated with numerous University departments including the Bursar and Registrar's Office to rectify account problems; resolved student account issues by successfully combing through interdepartmental data.
- Updated and maintained the student in-flow logbook; calculated the number of students counseled in-person on a monthly and year-end basis.
- Trained up to ten (10) new student employees on fundamental financial aid and office protocol.

Selected Accomplishments:

- One (1) of four (4) students selected to counsel via email.
- One (1) of two (2) students permitted to update and maintain office bulletin boards.

Additional Experience:

Financial Aid Consultant, Self-Employed, Any Town, USA, Sept. 2010 - Dec. 2010

TECHNICAL ADDENDUM/SOFTWARE KNOWLEDGE

- GLOBAL, FAME, SAM/SIS, CAMS, CAMPUSVUE, SABA, SAS, COD, NSLDS

Financial Aid Packaging-Clock Hour, Credits, Prorations, BBAY/OLP, Standard and Nonstandard Terms, Verifications, R2T4 Calculations, SSACI Program

- Experience Completing FISAP and IPEDS

PROFESSIONAL AFFILIATIONS

- National Association of Financial Aid Administrators (NASFAA)

References Furnished Upon Request