

Summary of Qualifications

I am a California State licensed Fiduciary (#332). I am a member of the National Certified Guardianship Assn. I work in both Riverside and San Diego counties. I can work as a Trustee, Conservator (of the Person and/or Estate), POA, or Representative Payee.

Employment

Robertson Fiduciary Services January 1994 – Present

- Years of experience as a professional fiduciary, acquiring 100% of clients on referral and reputation.
- Reconcile daily, weekly, and monthly bank transactions (deposits, transfers, and withdrawals).
- Prepare billing statements of services rendered for each client.
- Manage sales contracts and postings of sales proceeds, and reconcile escrow statements for home sales.
- Prepare Income and Appraisal Sheet, Income and Disbursement Statement, and Summary of Accounting that is reviewed annually by a Superior Court judge for accuracy and fairness.
- Deliver excellent customer service as recognized by business associates, clients and clients’ families.
- Prepare regular written communication for client’s family and for legal recordkeeping.
- Excellent phone skills. Effective at maintaining professional composure and positive working relationships in difficult situations.
- Work for another Fiduciary while she is out on medical leave.

Substitute Office Clerk- Murrieta Valley Unified School District September 2005 – January 2007

Murrieta, CA

- Maintain records for the Parent center.
- Order supplies for upcoming classes.
- Send materials to be copied. Kept copied classroom materials current and well stocked.
- Receptionist for the Parent Center; Handled a 5-line switchboard.
- Teach evening Parenting Classes (Incredible Years) for court ordered parents.

Community Relations Manager Barnes and Noble Booksellers January 2007 – April 2008

Escondido, CA transfer to Temecula, CA

- Coordinated activities for employees, supervisors and managers as well as write the calendar of events for the store.
- Acted as a liaison between the store and surrounding school districts to provide knowledge of product and continuous customer service.
- Updated and maintained Educator data base.
- Provided support to others on the management team to help get assigned projects done in a timely manner.

Education

AA. in Marketing

San Diego Mesa College, San Diego, Ca

Continuing Professional Education – PFAC