

## Jamie Tolbert

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### Professional Summary

Certified Associate in Project Management (CAPM) and Certified ScrumMaster (CSM) with a background in finance operations, known for strong communication, organizational, and analytical skills. Transitioning into project management specializing in stakeholder engagement, risk management, and agile methodologies. Established a proven track record in identifying process improvements, solving complex problems, and fostering team collaboration to drive project success. Adept at balancing priorities and maintaining high standards under pressure.

### Certifications

- **Certified Associate in Project Management (CAPM)** | Project Management Institute (PMI) | 2024
- **Certified ScrumMaster (CSM)** | Scrum Alliance | 2022

### Relevant Skills

- **Project Management:** Project Planning, Risk Assessment, Agile & Waterfall Methodologies, Resource Allocation
- **Communication:** Stakeholder Engagement, Team Collaboration, Cross-Functional Communication, Reporting
- **Problem Solving:** Root Cause Analysis, Process Improvement, Risk Mitigation, Decision-Making
- **Organization & Time Management:** Task Prioritization, Timeline Management, Project Management Software, Goal Tracking

### Professional Experience

#### Scheduling Project Support

Cook & James LLC | Remote

January 2022 – November 2022

- Provided project support on a contracted basis, assisting with scheduling, meeting coordination, and task tracking to ensure timely project delivery.
- Facilitated communication between stakeholders, addressing concerns and ensuring alignment on project deliverables.

- Documented project requirements and action items, establishing a streamlined documentation process for future projects.

### **Lead Operations Specialist**

Triad Advisors | Norcross, Georgia

February 2019 – September 2021

- Managed end-to-end financial operations processes, including compliance checks, and reconciliation, leading to an overall accuracy improvement of 20%.
- Partnered with cross-functional teams to identify and implement process improvements, reducing operational bottlenecks and increasing efficiency.
- Led regular status meetings with department heads to align objectives, address roadblocks, and ensure project milestones were on track.
- Developed and maintained financial reports, providing critical insights for decision-making and successfully communicating key performance metrics to executive stakeholders.
- Trained junior team members on standard procedures and workflows, enhancing team productivity and knowledge sharing.
- Led and provided support to a team of 10 professionals in executing audit projects with precision, ensuring full compliance with FINRA and SEC regulatory standards.

### **Senior Mortgage Loan Officer**

First Securities Financial Services | Remote

May 2018 - June 2020

- Provided expert guidance to clients on mortgage application processes, requirements, and documentation, ensuring effective communication and engagement throughout the loan lifecycle, particularly with first-time homebuyers.
- Monitored and tracked loans progress daily, proactively identifying and mitigating risks to ensure timely loan closures.
- Conducted thorough analysis of applicants' financial and credit data to assess pre-approval eligibility and align applicants with the appropriate loan products.
- Ensured quality control and compliance by reviewing loan submissions for accuracy and adherence to regulatory and company standards.
- Exceeded brokerage sales targets by consistently achieving an average of \$1.5 million in closed loans annually.

## **Professional Development**

Professional Sabbatical

November 2022 – November 2024

- Dedicated time to advance knowledge and skills in project management by obtaining CAPM and CSM certifications.
- Completed coursework in Agile methodologies, risk management, and project planning to align with industry standards and best practices.
- Sought mentorship and expanded professional network by connecting with experienced project managers and industry leaders, gaining insights into effective project delivery, project management tactics, and career growth strategies.

## **Education**

Bachelor of Business Administration – Finance

[Kennesaw State University] | [Kennesaw, Georgia]

[2015]

## **Technical Skills**

- **Project Management Tools:** Microsoft Project, Jira, Monday
- **Other Software:** MS Office Suite (Excel, PowerPoint, Word), Salesforce, Caylx

**References Available Upon Request**