David Kahn

From: National Association of Counties <ClientServ@yourmembership.com>
Sent: Friday, April 25, 2025 12:34 PM
To: CtyAdmRecruitment
Subject: New Application for COUNTY ADMINISTRATOR from National Association of Counties

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National Association of Counties

Greetings!

You have received a new application for the COUNTY ADMINISTRATOR position posted on National Association of Counties!

Replying to this email will contact the job seeker.

We have also included any messages that the job seeker has included in their application below:

Message:

MAHENDRA S. RATHORE MBA, B.A. (Honors), PMP, CFP®, CRPC®, ChFC® CLU® [redacted] • MahendraSingh.FinanceExecutive@Gmail.com (M) [redacted] • (H) [redacted] Executive Profile An agile financial services leader with deep and varied experience in managing multi-cultural, multigenerational teams in matrix organizations in wealth management, financial advisory and brokerage operators. Deep Expertise in Financial Operations & Planning, Practice Management, Change management, project management, risk management, governance framework , stakeholders' management, cross-functional teams' leadership. Supervised client experience impact, risk and e process re-engineering, systems enhancement, training & education delivery, design, and implementation of key Metrics (KPIs) KRAs, client communications, and hiring, mentoring & coaching managers to effectively execute, measure and sustain the innovation, excellence, and change. Strong knowledge of the Broker Dealer, Bank and Trust firms, RIA business segments; deep understanding of, financial markets, and wealth & investment management, brokerage operations and robo wealth advisory services. Highlights of Expertise Wealth & Asset Management Financial Planning & Analysis Client Management / Relationship Building Full Cycle Project Management RIA, Clearing ,Custody & Brokerage Operations Retirement Planning Multi-cultural Client Strategy Customized Investment Strategies Portfolio Management Estate & Trusts / Life Insurance / Annuities Project Management and Business Analysis Lean Six Sigma Agile & Change Management DC & DB Plan Management Business Consulting Public Speaking / Presentations Equity Markets / Debt Markets Compliance Principal & Risk Management REITs / Structured Notes / Derivatives / Alternative Investments Tax Efficient Strategies Financial Wellness Educator Career Highlights Championed the highly successful WM Lean Training project, spanning three years; resulting in substantial results including the following: improved quality by 35%, cut lead times by 26%, and cut costs by 22%. Strong financial analysis and data analysis skills with passion for data -inspired decision making. Identified and implemented Best Practices in Service Excellence, "NWoW" in Wealth Management products & Services. Led a team of Small Business Bankers (SBB), who provided comprehensive financial solutions to small businesses with annual revenues from $50M up to $155M. Career Experience Omega Wealth Management , Charlotte, NC Wealth and Investments Consultant Develop Comprehensive wealth and financial plans. Analyze & implement Hedging and Derivatives strategies, Investment Management, Quantitative analysis, scenario planning and innovative insights, value proposition. Manage and Monitor Portfolios- including ETFs, mutual funds, Strategic & tactical Portfolio. Develop and Implement Asset Allocation, Investment Management strategies , customized Wealth Plans, Review Credit and Banking needs analysis, Equity and fixed income, Alternative Investment ,ESG, Private Equity, Real Estate (REITs). Drive Relationship management, client's investment portfolio management and objective guidance. Deliver Financial Wellness Presentations, Lead change management and Project Management initiatives Provide expertise on clients' process improvement projects, NWoW and Innovation initiative to enhance efficiencies, reduce costs, drive profitability and achieving overall KPI goals Leveraging relationship management, and problem-solving skills to grow client's assets through planning. AXA Wealth Management, Charlotte, NC Sr. Manager– Wealth Management - Financial Planning (2017 to 2020) Serve as an integral part of the senior leadership team, responding to strategic questions concerning investment strategies and drive the decision-making process regarding business unit strategy, customer segmentation, pricing, and product development. Guide financial planning operations, delivering full breadth of financial planning, investment management, and A.A. tools / techniques to foster more in-depth conversations with high-net-worth clients. Additionally, facilitate well-informed judgments in an uncertain environment. Conduct approximately 1220 comprehensive financial plan reviews, generating an annual increase of >124% YOY. Boosted planning business by 75% and increased incremental revenue of $1.3MM by facilitating comprehensive training programs for more than 500 financial advisors in fee-based planning tools. Championed an innovation and WM process improvement project that improved quality by 35% while cutting lead times by 25% and costs by 28%. Increased sales by 40% with $140MM additional client Assets within a one-year through effective portfolio management (financial planning, investment strategies, and asset allocation strategizing). Achieved 99% client satisfaction scores with 100% retention rates: improved customer loyalty and engagement, optimizing acquisition and elevating the NPS by 35%. Conceptualized, developed, and delivered 45 training seminars on financial wellness and planning as well as estate, trust, and retirement planning; increased corporate planning business by 135% with net revenue growth of $850K. Aon Hewitt Financial Services, Charlotte, NC Lead Investment Advisor & Financial Planner (2013 to 2017) Leveraged intellectual curiosity and ability to introduce new ideas to create consultative, client-centric approaches business opportunities and challenges. Designed investment plans for pre-retirees and retires to live comfortably during retirement years by providing expertise to 401K plan participants and self-directed brokerage accounts. Conducted due diligence and research on DB and DC plans investment offerings utilized by plan sponsors including core funds offered, investment elections, portfolio structuring, tax efficiencies in distributions, and professional advisory fee schedules. Ranked in top 5%, increasing plan enrollments by 20% through delivery of differentiated, customized solutions; applied a holistic approach to investment management, financial advice, and estate planning. Educated 401k plan participants regarding the benefits of Aon Hewitt's Investment Advisory Services: created and facilitated in-person financial workshops focusing on investments, retirement planning, and asset allocation. TIAA-CREF Financial Services, Charlotte, NC Wealth Management Advisor, Investment Consultant & RIA (2011 to 2012) Exemplified core leadership values to drive strategic planning and execution to maximize returns. Worked diligently to identify and address areas of critical opportunity across the department while maintaining a client-focused demeanor. Designed several in-person financial workshops concerning investments, retirement planning, and asset allocation, as well as investment methodology, investment advisory technology, and the delivery of investment advisory services. Pioneered the "Do More with less" initiative for a team of 12 representatives, improving delivery of services by optimizing best practices to improve client engagement and retention. Introduced telephone needs assessment techniques that decreased average cost per call by 25% across the team. Cultivated leads resulting in a 22% increase in accounts with referral revenue of $ 2.5M within 3 months. Boosted revenue growth in the Executive Equity Comp and Income category by 32%. Delivered value added niche planning solutions, increasing revenue by $4.8M; exceed goals by $3.5M in 12 months. Additional Experience: Financial Planner, Investment Advisor & Registered Investments Representative, MetLife Securities, Inc., CLT, NC Wealth Advisor / Investment Advisor, Merrill Lynch, Inc. – Wealth Advisory Services, Charlotte, NC Manager, Global QA & Brand Management, Best Western Intl., Phoenix, AZ Director of Operations & Controller, Omni Group of Hotels, Charlotte, NC Director of Operations & Finance, Marriott International Franchise, Mid-Atlantic (CLT, NC) Education Master of Business Administration in Finance & Accounting University of Rajasthan, Jaipur, India Master of Arts in Economics and International Trade Jawahr Lal Nehru University, New Delhi, India Bachelor of Arts (Honors) in Economics & Statistics Jay Narain Vyas University, Jodhpur, Rajasthan Professional Development & Certifications Certificate in Financial Management- Yale University- School of Management, CT. Certificate in Behavioral Finance – Duke University, Fuqua School of Business, NC Certification in Global Financial Markets – Yale School of Management, CT. Certificate in Project Management & Business Analysis- CPCC College, NC Diploma in Sales Management Excellence- Marriott International University, MD CFA- Currently pursuing Expected to complete in 2023 CIMA- Attended Wharton Executive Education Program (01-2020) LLB Law Course - Corporate, Civil and Labor Laws Professional Licensure FINRA Series 24 (Registered Principal), 65, 63 & 7 License & Series 66 - Registered Investment Advisor Insurance Licensure Fixed & Variable Annuities, Life & Health, Accident & Sickness, Property & Casualty, Medical Insurance, Life & Health Insurance and L.T. Disability (N.C.) CFP® – Certified Financial Planner CRPC® - Chartered Retirement Planning Counselor CRMS®- Certified Revenue Management Specialist CSEL ®- Certified Sales Excellence Leader PMP®- Certified Project Management Professional CFA® – Chartered Financial Analyst Candidate CRM®: Certified Revenue Management Specialist ChFC®: Certified Financial Consultant CHE®: Certified Trainer with ISTD QA Auditor -Institute of International Quality Assurance. BAAP: Certificate in Business Analysis CIMA®: Wharton Executive Education (2020) Professional Affiliations FINRA, NAPFA, FPA, AH&LA, CFP, FINRA, ASTI, FENG, PMI, ASTD, AAHOA Skills: Strong analytical skills, problem-solving capabilities, and presentation skills, Advance Problem-solving Skills, Multi-Tasking Skills, Certified Administrator, Business Analysis, Social Security Specialist, Medicare Certified, Executive Equity Compensation Plans Specialist, Certified Training and Education Coach, Operational Excellence, Entrepreneurial Mindset Business Process Improvements, Sales Excellence, Strategy & Execution, Cross Border Projects, Investment Analysis, Active listening and empathetic agile mindset, Highly organized and outcome focused. Technology: Expertise in Microsoft Office Suite -Excel; Power Point, Access Excel, and Python, Tableau and SQL and Data Mining. Proficient in Sales Force automation, Reuters, Bloomberg, Oracle, SAP, Quicken, Lotus Notes and DataStream, and Microsoft Project Management.

Job Seeker Information:

- Name: Mahendra S Rathore
- Email Address: mahendrasingh.financeexecutive@gmail.com

Job Information:

- Job ID: 77421718
- Job Name: COUNTY ADMINISTRATOR
- Position Title: COUNTY ADMINISTRATOR
- Posted: Mar 28, 2025

If you have any questions or need any assistance, please do not hesitate to contact our customer service team at clientserv@yourmembership.com or call us at 860-437-5700.

Thank you for using our services.

National Association of Counties [jobs.naco.org]
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