

JOLENE K. HICKMAN
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OPERATIONS MANAGEMENT
Financial Services • Trust Operations • Non-Profits

A proven operations manager with experience in financial services, trust operations and custody, Mutual Funds special project management and non-profit corporations. Skilled in identifying opportunities to streamline operations for cost effectiveness. Experience includes, budgeting, quality assurance, system utilization and managing people.

PROFESSIONAL EXPERIENCE

JEFFERSON WELLS, Columbus, Ohio

2000-2008

A subsidiary of Manpower Inc providing professional services to a variety of businesses.

Financial Consultant

- Collaborated with client banks to redesign policies and procedures to satisfy regulatory concerns and reduce potential fines and penalties.
- Managed audits for mid to large size client banks to determine compliance with the Office of the Comptroller of the Currency and Security and Exchange Commission regulations designed to minimize reputation risks.
- Assisted a broker dealer in preparing a compliance program for their proprietary wholesale Mutual Fund offerings to ERISA clients to satisfy regulatory concerns resulting in an avoidance of fines or potential loss of trust powers.

FINANCIAL INDUSTRY TECHNICAL SERVICES, INC., Denville, New Jersey

1999-2000

Consulting firm providing technical expertise within the Banking and Trust arena.

Financial Consultant

- Completed an onsite software installation consisting of data population, testing, drafting procedure manuals and training bank personnel on a performance management system for a mid size national bank trust department thus providing the opportunity for increasing fee income potential.
- Assisted a mid size national bank with merging proprietary mutual funds by balancing the fund books between transfer agent and custody agent, balancing underlying asset position between custody agent books and depository. Researched reconciling items and corrected reconciling items resulting in minimal losses.

INTERIM ON PREMISES, Columbus, Ohio

1998-1999

Staffing firm providing clients with technical expertise.

Financial Consultant

- Managed and coached teams responsible for the reconciliation and processing of adjustments for 160 retirement plans for a regional bank Trust department. Project identified reconciling items totaling approximately \$100 million dollars in corrections.
- Trained staff on the correction methodology, reviewed reconciliations, approved adjustments to the accounting records, fielded questions and reviewed final statements for accuracy.

FLORABUNDA DESIGNS, INC., Columbus, Ohio

1997-1998

Privately owned event planning and floral business.

Office Manager

- Implemented and installed computerized accounting system as stage one of an automation project.

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HUNTINGTON BANKS, Columbus, Ohio

1981-1997

Regional financial institution providing services to clients in the Midwest.

Vice President, Manager Stock Transfer Operation (1994-1997)

Reported to the Senior Vice President of Trust Operations.

Department responsible for processing legal transfers, paying dividends, processing proxies, administering dividend reinvestment plans, and directing research projects, preparing departmental budgets and controlling expenses.

- Organized a team to bring departmental records into balance with internal books and external books thus avoiding a \$4 million loss.
- Implemented cost saving processes totaling \$100,000 of a total budget of \$600,000 by outsourcing transaction processing, system support and utilizing existing banking services such as ACH processing and lockbox.

Vice President, Quality Assurance Officer (1988-1994)

Reported to the Senior Vice President of Trust Operations.

Responsible for monitoring various functions in the areas of security and cash movement, income collection, systems, reconciliation, mutual funds and custody group by designing and utilizing system reports. Point person for product development teams, external custodial relationships, client meetings strategy sessions and regulatory reviews.

- Designed tests to monitor quality of services provided to top clients via various product lines resulting in increased client retention.
- Assisted area managers in recovery of past due funds, budgeting, and implementation and design of cost saving measures saving the Bank \$3 million in potential charge offs.
- Participated in Trust system conversion from SEI to NCS Series 7/ Sungard including but not limited to RFP design, review and scoring, testing system modules and reconciliation of data movement and balances.

Assistant Vice President, Manager Trust Operations (1985-1988)

Reported to Vice President of Trust Operations.

Responsible for management of security and cash movement, income collection, reconciliation and custody group within Trust operations.

- Participated in project to convert Common Trust Funds to Proprietary Mutual Funds. Responsible for regulatory research and interfaces with internal and external service providers and regulatory bodies.
- Implemented internal service agreements designed to define area responsibilities and expected service levels.

Audit Officer, Supervisor (1981-1985)

PROFESSIONAL AFFILIATIONS

Fiduciary & Investment Risk Management Association 2005-Present

Depository Trust Company Advisory Board, Security Settlement Group 1996-1997

COMMUNITY SERVICE

Columbus Zoo and Aquarium Appointed to the Board of Trustees by Mayor Coleman 2001-Present
Development Committee, Audit & Finance Committee, Endowment Sub-committee

Columbus AIDS Task Force (CATF) Board of Directors 1995-2002, Ex-Officio President 1999, President 1998, Vice President 1997, Treasurer 1996 and Secretary 1995 **CATF Art for Life** Event Co-Chair 1989-1995

Human Rights Campaign Columbus Dinner Event Co-Chair 1995, Treasurer 1992-1994

EDUCATION

B.A., Business Administration, Accounting, OTTERBEIN COLLEGE, Westerville, Ohio