

# MATTHEW ORTIZ

I have residences in:  
Philadelphia, PA ♦ Austin, TX ♦ Jakarta, Indonesia  
[Click Here to Email Me](#)

## EDUCATION & QUALIFICATIONS

---

Bachelor of Arts from the University of Texas at Austin. 2005  
Cultural Anthropology and Asian Studies, 3.23 GPA Overall

Army Officer Candidate School Diploma  
Army Engineer Officer Basic Course Diploma

Series 6 & 63  
PA Life & Annuities, Health & Accident Insurance Licenses

## SKILLS RELEVANT COURSEWORK

---

Windows & Linux	Adobe Acrobat Professional	Dreamweaver & Frontpage
MS Word, Excel, and Access	MS Project	MS Moviemaker
Terrain Analysis	Outlook & Lotus Notes	Intelligence Reporting
Government Contracting	Strategic Planning	Construction Management

Coursework includes:

Anthropology	Asian Cultural History	French
Archeology	Middle Eastern Cultural History	Chinese
Psychology	Islamic Cultures & History	Japanese
	Central Asian Cultural History	

## EXPERIENCE & ACCOMPLISHMENTS

---

US Army Reserve September 2010- Current  
**Engineer Officer/Section Leader/744 MP BN** *Army Corps of Engineers*

Lead Engineer Section consisting of carpenters, plumbers, electricians, and heavy equipment operators fulfilling the construction and repair needs of a military police battalion. ♦ Developed soldiers and subordinate leaders by developing, designing, and overseeing trainings. ♦ Successfully took ownership of personnel issues. ♦ Managed resources and equipment. ♦ Lead construction projects. ♦ As Staff Engineer participate in strategic mission planning with responsibility for environmental and terrain impacts.

### ACCOMPLISHMENTS

- Successfully lead 7 construction projects. Conducted electrical repair, building training area, repair and

- finishing of other training areas, indoor finishing, and roofing.
- Developed relationships with civilian NGO's for improved training opportunities and overcome budget restrictions.

Vanguard  
***Investment Consultant***

January 2007-January 2012  
*Philadelphia, PA*

Explained company retirement plans and executive non-qualified compensation plans, investment risk, portfolio analysis, taxation, legislative provisions, fee based account management, and how to read financial statements, balance sheets, and prospectuses. ♦ Helped American workers find a respectable retirement.

#### ACCOMPLISHMENTS

- Lead monthly diversity projects using displays and events presenting varying perspectives and cultural knowledge to encourage associates to improve their interactions with customers and each other.
- Transformed generic correspondence and confirmations into marketing opportunities reducing divisional marketing costs by \$880,000 per year.
- Created a database for the tracking, scoring, and reporting phone calls in order to improve service and monitor performance.

Banker's Life & Casualty  
***Insurance Agent***

June 2006- Dec 2006  
*Philadelphia, PA*

Prospected and sold health insurance, life insurance, and annuities.

Hongkong Shanghai Banking Company, NA.  
***Premier International Sales Associate/Project Associate***

August 2005-May 2006  
*Buffalo, NY*

Worked on various projects on departmental re-organization and introduction of new products and services. ♦ Opened accounts in the US and together with peers helped customers fulfill requirements to open accounts in other countries. ♦ Trained branch employees to use new ATM balancing software. ♦ Tested systems and developed interactive troubleshooting guide for its use. ♦ I organized information and worked with vendors to get employee access to vendor systems to allow use of their software at the individual level.

#### ACCOMPLISHMENTS

- Launched a new department to sell to high net-worth individuals. I discovered a niche and altered our strategy to target key individuals allowing us to increase department sales from \$50 thousand to over \$1 million per month in new deposits and grow the department.
- Reduced the cancellation rate of our International Cash Management operation for large market-cap US multinational corporations from 30% to less than 10%. I joined the department during a period of record sales volumes but were facing a cancellation rate greater than 30% due to a three to four month on-boarding process. Each customer would provide \$500 thousand to \$2 million per year in fees. I used technology to reduce the legal documentation process from 1 week to 3 hours. I used ethnological methods and reduced the time needed for international technology integration from over 1 month to less than 1 week.

AT&T Wireless  
***Customer Service Representative Mentor***

June 2003-May 2005  
*Austin, TX*

Resolved technical and billing issues, sold services, and processed upgrades. ♦ As a Mentor I oversaw on-the-job training for over 100 employees at a time. ♦ As a Feedback Panel Member I represented employee's opinions to management about strengths and weaknesses of marketing strategies, systems, policies, and other issues.

## ACCOMPLISHMENTS

- I designed and proposed a customer loyalty program that was implemented at the national level. It saved approximately \$18 million in cancellations. The “Customer First Program” I designed it in response to a management request for ideas on how to reduce cancellations at minimal cost. I used advertising psychology principles paired with comments I had received from customers. Although highly successful the program was not continued after we were purchased by Cingular Wireless due to differing business concerns.

