

KATHLEEN DELORUSSO

PROFESSIONAL EXPERIENCE

Beals Associates, Inc., Boston, MA
Business Manager

2015- Present

- Manage all office administrative operations
- Perform all financial activities and record keeping with strict attention to detail. Reconcile and balance accounts, prepare reports for management, and generate invoices and monthly statements.
- Provide executive support to leadership team
- Administer employee benefits and maintain employee records, policies, and other basic Human Resource responsibilities
- Monitor all insurance requirements and maintain records as needed
- Manage contract and price negotiations with vendors and service providers
- Provide project support to team members
- Communicate with clients to address inquiries and resolve issues

CarrThaxton Financial Group, Lexington, MA
Director of Client Services

2007 – 2015

- Managed and resolved all client service issues, account documentation, correspondence and compliance
- Scheduled client review appointments, calendar management, bookkeeping, expense reporting and vendor relations
- Managed office operations, tracked investment transfers, distributions, business agreements and prospective sales leads
- Marketing, new business prospecting, social media and event planning
- Created and delivered exceptional client service experiences

Atlantic Pension Company, Lynnfield, MA
Third Party Plan Administrator

1994 - 2004

- Updated databases and follow-up on outstanding issues
- Analyzed and reconciled plan assets/allocations, contributions and loan documentation while staying within all compliance guidelines as required by law
- Performed ADP/ACP Tests and Form 5500 and other IRS/DOL filings
- Built strong relationships with clientele and co-workers

Eastern Bank/Malden Trust Company, Malden, MA
Regional Operational Supervisor, Retail Banking Division

1986 - 1995

- Supervised retail banking operations for 13 banking locations
- Responsible for appropriate branch staffing, auditing and daily balancing reports,
- Developed & implemented banking policies & procedures, trained new employees
- Assisted Retail Banking Division during bank acquisitions and mergers

CERTIFICATIONS

Notary Public – *Commonwealth of Massachusetts*