

CHRISTOPHER E. MARTIN

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EMPLOYMENT HISTORY

- 1/03-present* *Program Officer, City of Milwaukee, Community Development Block Grant*
- Responsible for monitoring \$1.6 million in economic development grants awarded by the City of Milwaukee
 - Audit activity and fiscal disbursements for 22 federally funded agencies
 - Provide technical assistance for the preparation of contracts, budgets, and cost reports
 - Recommend future awards through performance analysis
 - Monitor: Emerging Business Enterprise Program Revolving Loan Fund
 - Monitor: Lincoln Neighborhood Redevelopment Revolving Loan Fund
 - Lincoln State Bank Revolving Loan Executive Board
 - Conduct site reviews and program evaluations
- 2/97-12/02* *USBank*
- 3/02-12/02* *Education Manager, Trust Officer*
- Responsible for conducting employee benefit investment presentations, annual updates and investment reviews to defined contribution participants
 - Consulted individual participants on investment selection and recommended investment strategies
 - Created employee communication curriculum
 - Assisted in recommending investment options for plan sponsors
- 1/00-3/02* *Account Manager; Trust Officer*
- Responsible for management and retention of 401(k), Profit Sharing, and non-qualified retirement plans valued between \$250,000- \$5,000,000 with 50 to 250 participants
 - Advised clients on ERISA legislation to ensure compliance with IRS Dept. of Labor regulations
 - Reviewed and consulted clients on their annual ERISA test results, trust accounting and administrative reports
 - Prepared benefit presentations for 50 –100 participant plans
- 2/99-1/00* *Investment Specialist*
- Proactively contacted customers and prospects by implementing an aggressive sales campaign
 - Counseled and reviewed clients investment objectives to provide solutions through the sale of investment products
 - Prepared investment presentations and client recommendations
 - Generated \$195,000 in sales revenue with sales exceeding \$2,500,000

6/97-1/99

Call Center Manager

- Responsible for establishing and effectively managing the daily activities of the Retirement Services Call Center
- Responsible for the support of over 600 retirement plans totaling 70,000 participants
- Established goals, procedures, and provided training for an eight person team.

2/97-5/97

Firststar Funds Retail Service Representative II

- Worked closely with the Registered Representative of the broker/dealer
- Assisted in the promotion and sales of the Firststar Funds
- Provided mutual fund information and resolved account problems.

5/95-1/97

Mutual Fund Representative, Strong Capital Management

- Discussed investment objectives and analyzed needs to suggest appropriate products and services
- Conducted investor trades, provided education on Strong mutual funds, and resolved account problems
- Responsible for cross selling to other departments

EDUCATION

University of Wisconsin-Whitewater 1987-1990

University of Wisconsin-Milwaukee 1992-1995

Bachelor of Arts 1995

Emphasis Political Science and Economics

LICENSES & CERTIFICATES

National Association of Securities Dealers

Series 6/7/63 license