

Alexander Stephenson

503-509-1916 | alexstephenson516@gmail.com | [linkedin.com/in/alexander-reed-stephenson](https://www.linkedin.com/in/alexander-reed-stephenson) | thealexanderstephenson.com

EDUCATION

Bachelor of Science in Finance | **Utah Valley University** | Orem, UT | *Expected May 2027*

- Verbal & Written Spanish Fluency Certification
- GPA 3.8

EXPERIENCE

Portfolio Operations Associate | **Fidelity Investments** | Salt Lake City, UT | *Jan 2026 – Present*

- Handle 25+ calls daily, executing account transactions across securities, distributions, and contributions while supporting asset movements of hundreds of thousands of dollars in compliance with regulatory standards.
- Apply Series 7 and Series 63 knowledge to guide clients through complex securities transactions and investment product questions, ensuring accurate account documentation on every transaction.
- Consistently rank in the 90th percentile for my call quality ratings, meeting and exceeding call volume and satisfaction benchmarks across a high-volume, metrics-driven environment.
- Identify data discrepancies and process gaps; escalate findings to team leads to maintain documentation integrity and service level compliance.

Co-Founder & COO | **GovSight** | *May 2025 - Jan 2026*

- Co-founded GovSight, an AI-powered municipal finance platform (OpenAI API) consolidating financial history, budgeting, and forecasting; pitched to 10 municipalities demonstrating \$90k/year in savings vs. other solutions.
- Built and delivered financial analysis presentations quantifying \$30k/year pricing vs. \$120k+ in combined competitor costs, delivered formal acquisition pitches to government software and private equity companies with business plan, go-to-market strategy, and growth projections.
- Recruited, onboarded, and trained a 4-person sales team, coaching reps on product knowledge and developing compensation plans and contracts.
- Built and configured HubSpot CRM with 100+ prospective customers for cold outreach, designed pipeline stages, and led end-to-end UI/UX design of the core product.

Sales & Operations Analyst Intern | **NOMYX** | Holladay, UT | *Jan 2025 – May 2025*

- Coordinated end-to-end logistics for 13+ executive engagements in direct partnership with the VP of Revenue and CEO, managing scheduling, prep materials, and cross-functional coordination between marketing and sales teams to ensure seamless client-facing operations.
- Built and maintained Salesforce pipelines to monitor operational metrics, analyze conversion data, and surface actionable insights for process improvement.
- Developed a structured targeting framework by synthesizing market data and internal feedback, standardizing outreach criteria to improve operational efficiency and prospect quality.

Admin & Data Specialist | **Entrepreneurship Institute, Utah Valley University** | Orem, UT | *Aug 2024 – May 2025*

- Built and maintained complex Excel tracking systems for 30+ events and programs, supporting data-driven decision-making on resource allocation.
- Served as a primary point of contact for internal and external stakeholders, managing ongoing relationship coordination across the institute.
- Project-managed logistics for 18+ workshops and conferences, coordinating cross-functionally across faculty, donors, and students.

LICENSES & CERTIFICATIONS

- FINRA Series 7 - General Securities Representative License
- FINRA Series 63 - Uniform Securities Agent State Law Examination