

# David Martinez

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## SUMMARY

Multicultural professional with fluent language skills in English and Spanish. A certified public speaker and meeting facilitator via Toastmasters International. Financial services expertise in numerous disciplines, including a 20-year track record of demonstrated achievements in the corporate, non-profit and public sectors. Certified homebuyer counselor through NCLR and financial coach through MN Homeownership Center. Strong network across the Twin Cities and capable of quickly establishing strategic networks across the region.

## EDUCATION

- **Master of Business Administration (M.B.A)** **Bethel University**  
**Graduated Spring 2012, Social Management Focus** **Arden Hills, MN**
  - Led twelve masters-level projects focused on leadership and organizational development at organizations including: 3M, Wells Fargo & Co., Thermo Fisher, and the Saint Paul Public Schools
  - Designed and implemented a business plan for a fitness start-up company
  - Graduated with a cumulative GPA of 3.77
  - Expertise in organizational leadership, program/project management and financial operations
  
- **Bachelor of Arts, International Relations** **University of Minnesota**  
**Graduated Winter 2001, Latin America Region Focus** **Minneapolis, MN**
  - CIEE study abroad program participant at Universidad Catolica in Santiago, Chile
  - New Student Weekend Mentor, America Reads Volunteer, U of M Wrestling team
  - Co-founder, Sigma Lambda Beta Fraternity, Inc. – Alpha Beta Chapter (Est. 1999)
  - Dean’s list, major GPA 3.25

## PROFESSIONAL EXPERIENCE

- **Management Trainee** **Enterprise Rent A Car**  
**Sep 2019 – Apr 2020** **Apple Valley, MN**
  - Achieved “best-in-class” customer service scores (90%+SQI) in the region
  - Served Alamo, Enterprise and National customers at both airport and non-airport locations
  - Top sales associate during 4 of the 6 months I was with the company
  - Effectively serviced various strategic relationships including: Abra/Caliber and Ford dealerships
  
- **Project Manager** **Martinez Group, LLC**  
**Aug 2018 – Aug 2019** **Montrose, MN**
  - Managed contractors and subcontractor teams to assure timely delivery of desired outcomes
  - Prepared, reviewed, and submitted commercial and government bids
  - Successfully operated heavy equipment and construction tools
  
- **Process Improvement Consultant** **MN Dept of Commerce**  
**Dec 2017 – Jul 2018** **Saint Paul, MN**
  - Developed and implemented customer service performance metrics and standards
  - Managed IVR (Integrated Voice Response) related projects
  - Facilitated meetings with management, executive team and front-line staff
  - Created Microsoft Dynamics 365 dashboards (Tableau) to monitor service levels
  
- **Part-Time Bus Operator** **MetroTransit**  
**Jul 2017 – Nov 2017** **Minneapolis, MN**

- Provide safe, timely, and courteous public transit service to customers across the Twin Cities metropolitan area
- Certified commercial driver's licence including U.S. Dept of Transportation safe driver endorsements
- Interact with diverse populations including ADA-eligible individuals
  
- **Founder & CEO** **TriunfoConsult, LLC**  
**Sep 2015 - Present** **Saint Paul, MN**
  - Securities broker (license pending) and financial advisor
  - Manage intermediate to complex tax situations for individuals, households and small businesses
  - Assist entrepreneurs launch and expand their small businesses
  - Host financial empowerment and financial literacy workshops and presentations in-person and via on-line webinars
  
- **Director of Enrollment & Admissions** **Hiawatha Academies**  
**Jun 2016 – Feb 2017** **Minneapolis, MN**
  - Managed the school district's recruitment and outreach budget
  - Established dozens of strategic partnerships with organizations to achieve enrollment objectives
  - Recruited, trained and supervised a team of eight outreach specialists
  - Created an end-to-end enrollment and admissions procedures document for the school district
  - Orally presented and expressed ideas at community-based workshops in ethnically diverse communities
  - Saw a 30% increase in overall applications year-over-year
  
- **Client Service Representative – Bilingual** **Internal Revenue Service**  
**Nov 2015 – May 2016** **San Juan, PR**  
*NOTE: Employment during year-long sabbatical to Puerto Rico*
  - Provided procedural and technical responses to inquiries about tax administration by telephone to taxpayers and their representatives
  - Navigated web-based and DOS-based computer systems including: ITLA, IDRS, AMS and the ASPECT Teleset
  - Resolved taxpayer issues both in English & Spanish and achieved 100% compliance and customer satisfaction scores
  
- **Part-Time Program Advancement Coordinator & Financial Coach** **CLUES**  
**Jan 2014 – Aug 2015** **St. Paul, MN**
  - Homebuyer Workshop Leadership Certification, National Council of La Raza (NCLR)
  - Established dozens of strategic partnerships to advance agency programs
  - Designed and evaluated homebuyer programs for first-time homebuyers within traditionally underrepresented individuals (served over 400 families)
  - Provided customized solutions for clients to help them achieve their financial goals, including setting up businesses with the MN Secretary of State's Office
  - Co-led civic engagement and citizenship initiatives
  - Prepared taxes and assisted with credit building programs (over \$1.6MM in tax refunds collected for low income families)
  
- **WELLS FARGO & CO.** **Various Locations**  
**Jan 2002 – Aug 2015**
  - **Strategic Marketing Alliances Consultant** **Wells Fargo Home Mtg.**  
**Nov 2012 – Aug 2015** **Arden Hills, MN**
    - Managed a multi-million dollar (\$225MM) strategic marketing alliances portfolio across 32 states
    - Administered real estate, marketing and union contracts including office and desk leases

- Monitored web-based databases for management of contracts, payments and services rendered
- Assured compliance standards by managing due diligence processes, third party vendors and federal regulations
  
- **Client Service Consultant 3** **Wells Fargo T&OG**  
**Mar 2008 – Oct 2012** **Minneapolis, MN**
  - Successfully managed an \$18MM dollar portfolio consisting of check image exchange relationships with over 50 financial institutions and the U.S. Federal Reserve
  - Evaluated existing processes and drafted project definition documents to improve productivity
  - Recognized as a *TOG Top Performer*, an award received by 3% of employees
  - Implemented a proprietary image exchange system that saved the company over \$9MM dollars in operational expenses
  - Subject matter expertise working with mainframe systems including: Datamart, Safe File Transmission, Viewpointe and SVPCO
  
- **Management Associate & Leadership Development Program** **Wells Fargo Phone Bank**  
**Feb 2007 – Feb 2008** **Shoreview, MN**
  - Supervised a team of 17 phone bankers and exceeded all established objectives
  - Implemented and managed personnel rules, policies and contracts
  - Created a Recruitment Video (resulted in a 15% recruitment increase for the business line)
  - Provided analytics support to quality assurance team which led to a reduction in failed authentications
  - Familiarity with telephony and web-based systems including: Avaya, IVR, SVT and SVP
  
- **Mortgage Consultant** **Wells Fargo Home Mtg.**  
**Sept 2001 – Jan 2007** **McLean, VA**
  - Funded \$3.5MM month-over-month as a wholesale account representative
  - Achieved Level I underwriting authority
  - Closed 19 Bond loans month-over-month (FHA, VA, Fannie Mae, Freddie Mac, RD, Manufactured Housing, Condo, Renovation, New Construction, Emerging Markets, First Time Homebuyer)
  - Expertise working with municipal housing agencies across the U.S. – Down Payment Assistance (DAP) programs
  - Expertise working with Builder and Realtor Associations across the U.S.
  
- **Human Resources Supervisor (Part-Time)** **United Parcel Service**  
**Oct 1999 – Jun 2000** **Eagan, MN**
  - Led recruiting efforts within ethnically diverse communities
  - Interviewed, hired and trained Spanish-speaking personnel
  - Contributed to turnover reductions (approximately 7%) at our Twin Cities-based locations
  
- **Prevailing Wage Compliance Officer (SEEDS Intern)** **MN/DOT**  
**Feb 1998 – Sept 1999** **St. Paul, MN**
  - Investigated minimum wage standards on hundreds of construction projects state-wide
  - Recovered tens of thousands of dollars in back-wages for construction workers
  - Project Manager on the Prevailing Wage Standards translation team (English/Spanish)
  - Recipient of the *Bill Yoerg Award for Excellence in Public Service*

#### **ADDITIONAL EXPERIENCE**

- **Workforce Development**
  - Ramsey County Workforce Investment Board Member

- Grants Review Committee Member, Nexus Community Partners
- Prevailing Wage Auditor, Minnesota Department of Transportation
- **Civic Engagement**
  - LatinoLEAD, Executive Committee Member
  - Political Candidate, St. Paul Public Schools Board of Education
  - Boards & Commissions Leadership Institute Fellow, Nexus Community Partners
  - *Alza Tu Voz Influye El Cambio* Civic Engagement Initiative, CLUES
- **Volunteerism & Diversity**
  - Non-profit coach, Asesores Financieros Comunitarios (San Juan, PR)
  - Vice President of Latin Connection, a 5,000-Team Member Network at Wells Fargo & Co.
  - Elementary School Volunteer of the Year, Junior Achievement of the Upper Midwest
  - Budget & Finance Advisory Committee Member, Saint Paul Public Schools
- **Housing**
  - Homestretch Counselor and Facilitator, MN Homeownership Center/CLUES
  - First-Time Homebuyer Workshop Coordinator, CASA de Maryland
  - Focus Group Coordinator, Frogtown Community Development Corporation

#### **AWARDS & CERTIFICATIONS**

- Young Hispanic Corporate Achiever Nominee, HACR
- Competent Communicator Designation (Public Speaking), Toastmasters Int.
- Corporate Diversity & Inclusion Champion, Wells Fargo & Co.
- 25 On the Rise, Minnesota Hispanic Chamber of Commerce
- Certified Translator & Interpreter (English/Spanish), Garden & Associates, Inc.
- Certified Microsoft Office Suite, OfficePro, Microsoft Project, SQL