

Kevin L Platt

859.630.3125

www.linkedin.com/kevinlplatt

klplatt@yahoo.com

Kevin is an experienced professional with a proven ability to create high customer satisfaction through the ownership of client relationships from end to end. He succeeds in developing and executing business strategies that exceed company growth objectives. He quickly develops trusted client and colleague relationships and is active in community relations.

- ✓ Relationship Management
- ✓ New Business Development
- ✓ Employee Engagement
- ✓ Volunteer Development
- ✓ Certified Residential Real Property Appraiser
- ✓ Series 7, 63, and 66 Licenses
- ✓ Organized and detail oriented
- ✓ Strong leader and mentor
- ✓ Community outreach

PROFESSIONAL EXPERIENCE

Real Property Appraiser

August 2015 – Present

Self Employed

- Complete real property residential appraisals in Kentucky and Ohio.
- Cover over six counties.

Relationship Manager

April 2014 – July 2015

Ingage Partners, Cincinnati, OH

Ingage Partners is a local management and IT consulting firm. Cincinnati's first certified B Corp, Ingage donates a minimum of 25% of annual profits to charity and provides pro-bono consulting services to non-profit partners. Ingage Partners offers IT software staff augmentation and full scope project work in software engineering.

- Create, coordinate and market over 25 community events for Ingage Partners to the public.
- Organize over 25 volunteer opportunities and events.
- Develop and execute business development plan for current and prospective clients in the Cincinnati/Dayton/Northern Kentucky area.
- Maintain trusted client relationships with senior level executives to ensure Ingage exceeds delivery expectations and is offered future consulting opportunities.
- Manage consulting staff of 10-20 at client sites. Associated tasks include monitoring status reports, planning and executing regular on-site meetings, managing consultant education plans, and escalating issues when appropriate.
- Recruit, interview and on-board 20 new consultants to the Ingage team.
- Track back office metrics including consultant utilization, budgets, profit, community impact, and operating expenses.

Private Client Specialist, Cincinnati Investor Center

April 2011 – April 2014

Fidelity Investments

- Cultivate client relationships, greater than \$1 million, via proactive client touches as well as responsive support and maintenance.
- Deepen client trust through understanding motivations, desires, and unique drivers to properly position Fidelity solutions.
- Investor Center leader for Fidelity Charitable solution, resulting in Cincinnati Investor Center opening over 75 Charitable Accounts in 2012. Fidelity has over 135 branch offices, the Cincinnati branch opened and funded the most accounts.
- Investor Center local market development lead: responsible for planning and executing nearly 50 events on and off site.
- Investor Center leader in strategic personal Investing campaigns, new opportunities, engagement practice, and client sourcing.

Premium Services Financial Representative
Fidelity Investments

February 2010 – March 2011

- Positioned solutions based on client awareness, sales, and knowledge of all Fidelity products.

Series 7 & 63 Mentor
Fidelity Investments

June 2008 – September 2008

- Compiled, facilitated, and led one-on-one, group study, classroom review sessions, and materials for Series 7 & 63 pre-licensees.
- 97% of all employees mentored passed the Series 7 & 63 license exam.

Service and Trading Representative
Fidelity Investments

May 2007 – May 2010

- Recipient of four Excellence in Action Awards

Real Property Appraiser, Office Manager
Childers Financial Services, Florence, KY

2003 - 2007

Opened and managed the Northern Kentucky office of Childers Financial Services. As a new business to the area, cultivated and retained new financial institution clients. Customer-focused business approach resulted in significant company growth under leadership.

- Increased clientele 200% within twelve months.
- Mentored and trained new staff for administrative and appraiser roles.

Real Property Appraiser
Self Employed

2002-2003

- Complete real property residential appraisals in Minnesota.
- Cover over six counties.

PROFESSIONAL DEVELOPMENT

Bachelor of Arts, Arts Administration
University of Kentucky, Lexington, KY

Series 7, 63, and 66 Licenses
Certified Real Estate Appraiser

COMMUNITY INVOLVEMENT

- **Tiger Dads, Program volunteer and Co-leader at New Haven Elementary.**
- **STEM Night organizer at New Haven Elementary.**
- **Youth soccer and baseball Coach.**
- **Colon Cancer Alliance volunteer and recruiter.**
- **Lego League and Robotics League volunteer and judge.**
- **IIBA chapter event volunteer**
- **Meredith's Miracles Colon Cancer Foundation fundraising and grant committee volunteer.**