



MASON WILSON

Junior Ira Specialist

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PROFESSIONAL SUMMARY

Proficient Junior IRA Specialist with two years of experience in managing and processing IRA accounts while ensuring compliance with IRS regulations. Adept at delivering exceptional client service and resolving account-related issues. Passionate about contributing to team success and enhancing client financial well-being through meticulous attention to detail and effective communication.

WORK EXPERIENCE

Junior Ira Specialist

Pineapple Enterprises

📅 Mar / 2024-Ongoing

📍 Santa Monica, CA

1. Administered IRAs, ESA, and HSA accounts, ensuring compliance with IRS regulations.
2. Updated internal procedures and trained staff on recent IRS regulations.
3. Audited transactions and corrected reporting codes to maintain accuracy.
4. Managed IRA accounts, ensuring compliance with IRS regulations and company policies.
5. Provided expert guidance on IRA contributions, distributions, and rollovers.
6. Managed departmental inventory and ordered supplies efficiently.
7. Provided support to colleagues across various positions within the department.

Ira Specialist

Summit Peak Industries

📅 Mar / 2023-Mar / 2024

📍 Denver, CO

1. Supported individuals with disabilities in daily living activities, enhancing their quality of life.
2. Assisted with personal care needs and daily living tasks, fostering independence.
3. Promoted the development of individual goals, ensuring personalized support.
4. Ensured the safety of clients during transportation and in public settings.

EDUCATION

Bachelor of Science in Finance

University of Finance

📅 Mar / 2022-Mar / 2023

📍 Denver, CO

Studied financial management, investment strategies, and regulatory compliance.

SKILLS

Client Relations



Compliance Management



Problem Resolution



Financial Literacy



Regulatory Compliance



INTERESTS

🎨 Art

🤝 Volunteering

🌲 Hiking

🧘 Yoga

STRENGTHS

🔍 Criticality

☰ Detail-oriented

🤝 Diplomacy

😊 Enthusiasm

LANGUAGES



English



Mandarin



German

ACHIEVEMENTS

- ★ Successfully processed over 200 IRA distributions, ensuring compliance with IRS regulations.
- ★ Implemented a new tracking system for HSA account inquiries, reducing response time by 30%.