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Analyze > Evaluate > Enhance

Understand and Organize

Capable of understanding and embracing corporate goals, procedures and culture quickly. Adapt smoothly and obtain functional competence rapidly. Immediately learn and master company tools, software, systems and interdepartmental relationships. Able to simplify and streamline multiple and unrelated work flows by incorporating input from upper management and organizational peers while minimizing resistance using honest dialogue and employing incremental improvements. *Fit in, function, and flourish.*

Evaluate and Improve

Analyze and review historical performance to improve predictive vision. Track and document errors and issues to eliminate recurrence and to formulate preventative measures. Design and deploy structured analysis of departmental challenges. Dedicated to training and staff development using relevant metrics and effective and participative assessment of performance. *Nothing can ever be improved without being changed.*

Unite and Energize

Defend the team while developing the individual. Leadership that is open and supportive while being consistent and disciplined where needed. Encourage and recognize individual contributions while maintaining the momentum that comes from an agile, intelligent group dynamic. Align the goals of the individual with the goals of the team. Then align the goals of the team with the goals of the firm. Remain open minded while articulating core beliefs. *Flexible fortitude.*

Professional Experience

EQUITY DIRECT, Las Vegas, Nevada

February 2007 to Present

Operations Manager/Funding Manager

Challenge: Help a privately owned finance company progress from broker to banker status. Create organizational structure, departments, policy and compliance in an unfriendly market climate.

Best Practices: Introduced and established an understanding of best practice principles. Refined a distracted and disorganized task approach to a goal-centric industry-standard approach. Worked with existing team members and ownership to draw out and document best practices. Planned and directed the transition to a modular, more comprehensive and consistent checklist approach.

Internal Expansion: Created several internal functions for a young and growing company including Human Resources, time tracking, policy and procedure statements, performance and review techniques.

External Expansion: Submitted written application packages to obtain additional Wall Street funding sources. Communicated with investors and coordinated the assembly and delivery of necessary documents and information. Successfully negotiated several new investor and agency relationships.

National Funding Risk Manager

Challenge: Privately owned local company with a stated mission of national expansion in a fiercely competitive climate with market deterioration. Main high quality of deliverables in a fast paced, often frenetic commission driven organization.

Growth with Control: Proposed and sponsored the creation of the “*Transition Department*” intended to collect, organize and deliver customized, function-specific training to new hires in an effort to maximize learning and practical retention while minimizing downtime commonly associated with orientation delays. Reduced ramp-up phase for new hires from 120 days to less than 30 days while yielding happy, energized and high quality performers in less time with less expense. Set the national standard for how to board new hires gracefully.

National Expansion: Leveraged the Transition Department to plan and conduct enterprise wide training and orientation for new branches, new production groups, and new management teams across the U.S. Effectively trained groups from one to 100 people as needed to board new production units gracefully. Drove company volume from monthly funding below \$30 million to consistent monthly funding in excess of \$1/2 Billion in two years.

National Audit Process: Created first ever Audit and Quality Control review process for major portions of national production support and operations group. Established comprehensive review and documentation process designed to reduce errors and track solutions.

Customer Definition: Worked directly with ownership, Sr. Management and production managers to endorse a unified definition of “customer” for my department to include employees, other departments, vendors, investors, and consumers. Converted a feared, uncooperative and misunderstood department within the company into the flagship support team which ultimately set the national standard for how to engage, empathize, and accommodate every customer every time.

Operations: Managed and supported National Operations staff of 20 people with diverse skill sets and occasionally opposing priorities while remaining the primary resource for regional and branch staff working outside of National Operations Center. Supported competing business units with alacrity without showing favor. Provided consistent, predictable accurate answers to all parties where ever possible.

UNITED CAPITAL, Las Vegas, Nevada

April 2002 to November 2003

Western Regional Operations Manager

Challenge: Define and refine the back office and production support functions of a large national company that was rapidly expanding and shifting its focus from a retail past to a future as a wholesale company.

Recruit and staff Regional Operations Center: Assembled and trained the entire operations group for the first ever ROC of a 14 year old national company headquartered in Aurora, CO. Directed the connection of systems, infrastructure, tracking and reporting between the home office and the newly created ROC which served 7 western states including California, Nevada, Arizona, New Mexico, Oregon, Washington, and Utah. Provided extensive feedback and submitted written recommendations regarding quality control, production expectations, performance requirements and minimum quality standards. Created work load balancing, cross training and regional workflow with a focus on intelligent innovation and best practices.

Regional Audit Process: Created first ever Audit and Quality Control review process for major portions of regional production support and operations group. Established comprehensive review and documentation process designed to reduce errors and track solutions. This evolved into the “Operations Knowledge Base” which was ultimately adopted by the corporate office and designated as the national standard for process improvement.

Regional Expansion: Researched state-specific regulations and agency requirements for the seven states in the Western Region. Designed and conducted training on rules and laws specific to each federal, state and county regulatory code. Proposed and implemented the “*Methodologies Clearinghouse*” designed to collect and share geographically-specific industry concerns or requirements with corporate office and other branches.

Operations: Managed and supported Regional Operations staff which consisted of 17 people with diverse skill sets and occasionally opposing priorities. Established deliberate communication conduits between the ROC and the

corporate office to assure the frequent and complete flow of information. Reduced the disconnect common to remote teams and branches. Defined and delineated areas of responsibility within the team while remaining open to opportunities and efficiencies. Created a disciplined but energized culture where performance, innovation and customer care were recognized and rewarded.

REPUBLIC/OLD KENT, Las Vegas, Nevada

May 1994 to July 2002

Regional Closing Manager

Challenge: Supervise a growing department as monthly production increased from \$5 to \$50 million in 18 months. Inherited team previously managed in a very negative, impersonal way. Manage growth, training and quality simultaneously.

Capacity Management: Recruited new team members, trained and incorporated them while operating the department at maximum capacity. Developed "job active" training programs that allowed new hires to work with existing staff to get trained and build confidence while not reducing overall performance of the group. Balanced the need for employee development with the need for uninterrupted workflow.

Best Practices: Coordinated with existing team members, ownership and business units to draw out and identify best practices in a way that could be documented and duplicated. Planned and directed the transition to a modular, more comprehensive and consistent checklist approach designed to improve quality and allow for increased cross training within the department. Leveraged the cross training to perform work-load-balancing throughout the monthly product cycle. Shifted staff and resources seamlessly as required by the pipeline and production. Recognized by Corporate Headquarters for maintaining the highest levels of accuracy of any branch nationwide for eight consecutive quarters.

Operations: Managed and supported diverse work groups with differing skills and focus which ranged in size from three to 15 members. As part of the Sr. Management team, worked among and between business units to maximize communication, cooperation and productive use of limited resources while minimizing conflict. Invited to personally participate at the national level on numerous work flow, standardization, and quality improvement initiatives including new software research, selection and implantation.

OTHER PRIOR EMPLOYEMENT:

Sterling Capital, Las Vegas, Nevada, **Sr. loan/Sales Coordinator/Team Manager** (2002-2003)

Mortgage Systems, Las Vegas, Nevada **Operations/Closing Manager** (1992-1994)

Margaretten & Company, Las Vegas, Nevada, **Senior Loan Closer** (1988-1992)

Nevada Savings, Las Vegas, Nevada, **Loan Closer** (1987-1988)

Continental/Thomas Escrow, Seattle, Washington, **Loan Closer/Title Clerk/Funder** (1984-1987)

EDUCATION

College of Southern Nevada, Las Vegas, Nevada
Associates in Business/Accounting, *estimated graduation 2008*

University of Nevada Las Vegas, Las Vegas, Nevada
Bachelor of Science, Business/Accounting, *estimated graduation (bachelors) 2010*
Master of Science, Forensic Accounting/Economic Crimes, *estimated graduation (masters) 2012*

Training:
Supervisory Skills, CareerTrack
How to Supervise People, Fred Pryor
By Referral Only, business development course

PROFESSIONAL/PERSONAL ASSOCIATIONS

Phi Theta Kappa inductee, 2007