

PROFESSIONAL EXPERIENCE

FIDELITY INVESTMENTS

Annapolis, MD

Branch Leader (BL)

December 2019 – Current

- I lead, train and hire a team of client-obsessed professionals, create a culture worthy of our associate's best efforts while ensuring we are delivering world-class customer service in order to become our client's primary trusted advisor

Bethesda Wealth Management Office

Bethesda, MD

Assistant Branch Manager (ABOM)

February 2018 – December 2019

- Responsible for the day-to-day operations and compliance for one of the largest branches in headcount and AUM; which resulted in a clean / "No reportable issues identified" internal audit examination for 2018 and 2019
- Sourced, interviewed, hired, trained and promoted a team of associates comprising of Intern's, FR's, RM's, IC's, FC1's, FC's, WP, and VPFC's that have achieved the highest levels of client engagement and advisor satisfaction

Branch Service Manager (BSM)

July 2015 – February 2018

- Led, managed and supervised multiple sales advisors and operations associates in both our Alexandria cluster branch through a BOM transition and in the home branch, coaching them to achieve their definitions of success
- Trained and responsible for handling client escalations, calling survey "Detractors" and settling associate issues with the conflict resolution model FACT and CSS (Consultative Strategies and Solutions) methodologies

FIVE (Fidelity Veteran Employee) ERG

National Finance Chair for the FiVE Employee Resource Group (Volunteer work)

January 2014 – July 2017

- Manage, track and supervise all aspects of a \$15,000 yearly budget covering 12 regional cost centers and expenses

General Management Apprentice Program (GMAP)

July 2013 – June 2015

The GMAP is a corporate-wide, two-year rotational program designed to develop high-potential talent for leadership roles within the company. The program includes four six-month assignments across various business groups, job functions, and geographic regions.

Personal Investing (PI)

Westlake, TX

PI Sales

January 2015 – June 2015

Manager - Central Relationship Manager (C-RM): Led, grew and developed the first team of proactive licensed representatives to execute on the national initiative of every VP/FC & FC with 15 quality appointments per rep per week

- Led effort among national peers to develop the standard variable compensation plan for all C-RM associates

Personal Investing (PI)

Smithfield, RI

Sales Effectiveness & Administration Team

July 2014 – December 2014

Manager - National Branch Sales: Directed the Fidelity.com "Accounts & Trade" Sales Deployment & Field Readiness project as well as supported branch leadership in the Providence Investor Center as a Financial Representative (FR)

- Created and deployed a field readiness project plan for the migration of over 17 million Fidelity.com customers as well as produced and delivered a weekly client sentiment report designed to inform senior leadership of project success

Workplace Investing (WI)

Westlake, TX

Workplace Participant Services (WPS)

January 2014 – June 2014

Manager - WPS Service Delivery: Managed a team of 19 dedicated Defined Contributions Representatives supporting, measuring and driving the delivery of exceptional customer service while ensuring the development of each team member

- Led the team to the highest average CEI (Customer Experience Index) scores in any 6-month period in its history with a #2 placement of 23 teams in the month of April for which I was recognized as the "Manager of the Month – April 2014"

Corporate Risk & Security

Merrimack, NH

Customer Protection & Financial Intelligence

July 2013 – December 2013

Project Manager & Business Analyst: Streamlined corporate security's fraud investigations projects and work processes for the customer protection program by aligning business needs with engineering project and product delivery

N. Perry Hepworth, CFP®

1910 Towne Centre Blvd. Annapolis, MD - www.linkedin.com/in/perryhepworth/ - 360.632.7299 - perry.hepworth@fmr.com

- Oversaw a dual server system migration totaling 19 servers/platforms housing over 80TB of highly sensitive customer data that provided a total cost savings of \$340,000 to Corporate Security and saved the firm millions in fraud loss

PROFESSIONAL EXPERIENCE

UNITED STATES NAVY

2004 – 2013

Current Rank: Lieutenant Commander (IRR) cleared TS with eligibility for access to SCI based on an OPM SSBI dated 13 June 2006

United States Naval Academy

Annapolis, MD

Military Leadership Instructor - Leadership Education & Development Division (LEAD) January 2010 – February 2013

Assistant Deputy Director: Responsible to LEAD director in the 2nd highest leadership position for a Junior Officer

- Rated #2 of 10 junior officers in the division by the commanding officer during annual fitness report
- Facilitated organizational restructuring for accreditation by developing presentations for senior leadership, structuring core curriculum and building brand awareness to include the designing of the division crest

Master Instructor: Educator for multiple sections of Naval Leadership and the Senior Aviation Practicum courses

- Awarded the distinguished 2011 “**Colleen S. Smiley-Owendoff Teaching Excellence Award**” – given yearly to the top military or civilian instructor across a multi-divisional faculty of over 100 educators
- Taught, mentored and evaluated over 200 students and guided 24 freshmen as their academic advisor

Academic/Operations Officer: Managed a 45-person and 3rd largest academic operations cost center at the USNA

- Initiated an effort that streamlined all academic responsibilities with digital processes, effectively reducing operations and saving the division hundreds of man-hours and money with 30% less resources available

Executive Officer: Volunteered to lead midshipmen on various experiential leadership development opportunities

- Led two crews of 8 midshipmen on “Navy 44’s” sailboats, qualifying four Watch Captains and instructing the technical, safety and navigation skills required for the Naval Academy’s summer Off-Shore Training Squadron sailing program, resulting in zero safety mishaps and a letter of commendation from the skipper
- Led a delegation of 29 midshipmen to the 2011 Mexican Bicentennial Cavalcade in Mexico City, Mexico

Naval Air Station Whidbey Island

Oak Harbor, WA

Naval Flight Officer – VAQ-140

October 2005 – January 2010

Successfully completed two combat deployments in both the OIF (Operation Iraqi Freedom) and OEF (Operation Enduring Freedom) campaigns onboard aircraft carrier USS DWIGHT D. EISENHOWER and the Al Asad airbase in Iraq where extensive experience in flight oriented research, preparation, briefing/presentation as an Electronic Countermeasures Officer ultimately resulted in being awarded the “**Navy Marine Corps Achievement Medal**” and two “**Strike Flight Air Medals**”

Personnel Officer: Led the administrative effort of a 25-person division over an 8-month training cycle

- Directed and oversaw a 220-person command medical and dental preparedness delivering 99% squadron readiness both ashore and at sea that was instrumental in winning the “Battle Efficiency” squadron Award
- Mentored 4 junior sailors to promotion, re-enlisted 2 sailors and assisted 1 to gain American citizenship

Line Division Officer: In charge of a 15-person division that was responsible for the preparation of 4 EA-6B jets

- Led and trained over 30 of the newest and youngest sailors ensuring squadron readiness prior to overseas deployment by guaranteeing 100% completion of the Plane Captain certification program
- Responsible for the upkeep and procurement of \$1.5m worth of aircraft and personnel equipment

Schedules Officer: Developed and coordinated a time sensitive daily schedule over an 8-month training cycle

- Tracked all qualifications and training requirements for 22 aircrew and organized all squadron flights, simulators, training & ground events for a 220-person command leading to a 97% event completion rate

Legal Officer: Directly responsible to the Commanding Officer, advising on all legal matters over 12 months

- Successfully prepared 23 legal proceedings for adjudication under timeline and with 100% filing accuracy

Naval Air Station Pensacola

Pensacola, FL

Naval Flight Officer Student

January 2004 – October 2005

- As elected class leader, facilitated cohesion and accountability that resulted in increased graduation rates

N. Perry Hepworth, CFP®

1910 Towne Centre Blvd. Annapolis, MD - www.linkedin.com/in/perryhepworth/ - 360.632.7299 - perry.hepworth@fmr.com

EDUCATION

Georgetown University

Certificate in Financial Planning

Washington DC

January 2016 - September 2016

- Completed program – Georgetown University is registered with the Certified Financial Planning Board of Standards Inc. to fulfill the educational requirements for the CFP® certification

Villanova University

Master Certificate in Applied Project Management

On-Line

July 2012 - January 2013

- Completed Villanova's PMP (Project Management Professorial) course

University of Maryland – Robert H. Smith School of Business

Master's in Business Administration

College Park, MD

August 2010 - May 2012

- Led two student group study aboard trips as team leader to China and London/Reykjavik visiting several industry leading businesses, focusing on international currency issues and the 2008 financial meltdown

University of Wisconsin

Bachelor of Arts Degree in Economics

Madison, WI

August 2001 - December 2003

- As 2nd in command, led the Naval Reserve Officer Training Corps (NROTC) Program as Battalion Master Chief Petty Officer – senior enlisted midshipmen officer responsible for accountability, physical training and policy enforcement for over 80 midshipmen university peers
- Company officer responsible for a team of 10 midshipmen that developed the battalion website
- Member of the competitive UW-ROTC Endurance Team

Dixie State University

Associates of Arts Degree – Magna cum Laude

St. George, UT

January 2000 - May 2001

- Served as the Public Relations Officer in the P.B.L. Club (Phi Beta Lambda - Future Business Leaders of America) earning public speaking honors in the final round at a multi-state college competition

International Volunteer Service

The Church of Jesus Christ of Latter-Day Saints

Viña Del Mar, Chile

September 1997 – October 1999

- Led, inspired and supervised groups of 4 -12 missionaries as a Senior Trainer, District Leader and Zone Leader
- Organized multiple service projects and delivered stake level firesides that aiding over 600 Chilean people

LICENSES, INTERESTS, and ACHIEVEMENTS

- CERTIFIED FINANCIAL PLANNER™ certificant - Board ID# 273570
- FINRA – Series 7, 9, 10, 66, 99. CRD# 6291639. Life, Health and Variable Annuity Insurance
- FAA - Private Pilot License & Instrument Rating
- Finisher of the 2018 Waterman's Half Ironman Triathlon
- Finished in the top 25% of the 2012 Nation's Triathlon in Washington, D.C.
- Former Member of the United States Naval Academy's Speakers Bureau
- Collegiate Letters in both Indoor & Outdoor Men's Track & Field and Full Naval ROTC Scholarship
- Eagle Scout and former volunteer Assistant Scout Master
- Traveled to approximately 27 countries and visited over 45 state capitols, many by Harley Davidson

N. Perry Hepworth, CFP®

1910 Towne Centre Blvd. Annapolis, MD - www.linkedin.com/in/perryhepworth/ - 360.632.7299 - perry.hepworth@fmr.com

- Fluent in Spanish:
 - Defense Language Proficiency Test (DLPT) scores: Reading: 2+ & Listening: 2+
 - Defense Language Aptitude Battery (DLAB) score: 102