

Paula Evans

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Client Services Professional

Collaborate with clients and team members to complete complex account documentation and transfer of assets. Communicate effectively with clients to provide efficient solutions. Resolve any concerns. Produce client communication and engagement activities. Maintain client case management systems. Display an air of personal, positive professionalism.

Professional Work Experience

Fidelity Investments

Service Solutions Specialist [2022–Present]

Provide expertise for complex service items. Review trust, power of attorney, and articles of incorporation documents for completeness. Work with clients to resolve conflicting information. Help clients feel confident to make clear decisions. Support Fidelity associates and clients with their complex account maintenance and money movement needs through a case management model. Engage via phone and written communication. Develop service solution strategies by supporting the needs of clients and front-line associates.

Charles Schwab/TD Ameritrade

Client Services Representative [2021–22]

Established trust and rapport through client engagement. Educated clients in the use of online tools for account management and trading. Facilitated client transactions for market trades, cash management, and tax planning. Used order management, workflow tracking, back office, and customer relationship management systems to access client information to process requests. Collaborated with internal teams to provide the most appropriate solution for immediate needs and pathways for future needs. Empowered newer investors and technology users to develop comfort and expertise using secure technology resources.

California Department of Education, Sacramento, CA

Education Programs Consultant [2016–21]

Assisted school districts as they built professional coaching systems for effective instruction. Created professional learning resources for online and onsite training for educators. Coordinated task groups to develop policies consistent with statutes, regulations, and executive orders. Conducted Federal Program Monitoring. Produced professional learning event for 3500 K–14 educators. Administered and monitored state grant (\$27 million) for Foster Youth Services Coordinating Program. Led the development of Community Engagement professional learning communities. Created and produced professional learning events, activities, and presentations about curriculum and instruction and governance for educators and leaders.

Accomplishments:

- Initiated and guided the development of the California Computer Science Standards and California Computer Science Strategic Implementation Plan.
- Produced
 - California STEAM Symposium (3500 attendees) which inspired educators, showcased student creativity, and provide insight into the value of hands-on learning in the curriculum;
 - California Department of Education Engaging Girls in STEM Townhalls (2000 attendees);
 - California Next Generation Science Standards regional training events; and
 - California School Recognition Program Professional Learning Day.

Harvard-Westlake School, Studio City, CA

Chair—Mathematics, Computer Science & Economics [1999–2016]

Established new and experienced teacher coaching programs and professional learning communities. Developed technology-infused teaching models. Implemented blended (online and in person) learning

models in department courses. Created and produced professional development programs for math faculty; math tournaments; STEAM-Fest; STEM and finance after school workshops and summer programs; and review seminars for external exams. Recruited and coached a staff of 50 full and part time teachers. Taught Algebra II through AP Calculus BC, Statistics, and Computer Science courses and workshops for financial literacy, robotics, and entrepreneurship.

Accomplishments:

- Increased faculty use of student-centered principles, online learning management systems, and real-time data to guide teaching.
- Increased enrollment and reduced student attrition across all student groups in math and computer science department elective classes by 30% from 2005 to 2016.
- Achieved extremely high standards of success, as measured by external exams, such as the College Board Advanced Placement and SAT exams.
- Chaired the Accreditation Program Committee (two cycles) & Educational Technology Committee (implemented minimum technical skill expectations and training for faculty) and created a model for an academic department continuous improvement process (Review and Renew).
- Established funding for a robotics program with the Harvard-Westlake Foundation.
- Led teams to create programs, such as:
 - STEAM-Fest (750 attendees) a student showcase event for STEAM courses and clubs;
 - Bridges to a Brighter Future, a student-run online math tutoring service;
 - Harvard-Westlake School Robotics team which competed in 12 US FIRST Robotics Competitions;
 - HW Inc, an entrepreneurial event for high school students to use their STEM and business skills; and
 - Harvard-Westlake Girls Who Code and Hack HW, supported by local businesses.

Recognition:

- Harvard-Westlake Distinguished Service Award 2011
- Harvard-Westlake Senior Tribute 2010
- Advanced Placement Exam Grader, Computer Science: 2002–04
- Who's Who Among American Teachers 1999–2008

Alabama School of Math and Science (ASMS), Mobile, AL

Assistant Professor [1992–1999]

Developed and produced summer workshops for Alabama mathematics educators. Created, produced, and taught distance learning courses. Developed online learning tools, such as a classroom discussion room, using Perl. Team-taught a project-based ecology course. Established ASMS statewide mathematics tournament. Sponsored Math Team, Finance Club, and Key Club. Taught College Algebra through AP Calculus BC, financial mathematics, and computer science.

Recognition:

- Who's Who Among American Teachers 1994–2004
- Toyota Investment in Mathematics Excellence Grant 1999
- GTE Financial GIFT Grant 1998
- BellSouth Pioneers Grant 1996 and 1998
- Mobile Walmart Teacher of the Year 1996
- International Paper Grant 1995 and 1996
- ASMS Outstanding Teacher of the Year 1995 and 1996
- ASMS Hall of Fame 1995

Licenses, Publication, and Education

Licenses: FINRA Series 7 and 63

Publication: *College Precalculus*, Paula Evans, et al, CK–12 Publishing, 2017

Education: University of Florida—MAT, Mathematics | University of Missouri—MA & BS, Applied Mathematics | University of California Extension—Web Development Certificate