

DONNA LEVIN

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SUMMARY

Training Professional with graduate certificate in Instructional System Development (ISD). Experienced using ADDIE model and Collins Blueprint for course development. Proven abilities in training new employees and sales representatives. Recruited, hired and developed staff. Trained staff and Investment Executives on existing and new financial instruments. Strengths include strong written, oral and presentation skills; needs assessment and creativity.

- Training and Development
- Relationship Building
- Management Skills
- Strong Communication Skills
- Motivator and Mentor
- Leadership

EDUCATION

Graduate Certificate in Instructional Technology
University of Maryland Baltimore County, Catonsville, MD

Currently enrolled

Graduate Certificate in Instructional Systems Development
University of Maryland Baltimore County, Catonsville, MD

August 2009

Bachelor of Arts in Education, Magna Cum Laude
St. Joseph's College, Brentwood, N.Y.

SELECTED ACHIEVEMENTS

Academic and Internship Experience

Graduate Certificate Student, University of Maryland Baltimore County, Catonsville, MD

- Designed numerous courses using the ADDIE Model and Collins Blueprint.
- Collaborative research paper on *Training the Multi-Generations for the Workplace*.
- Designed new employee training orientation that included objectives, evaluation strategy and lesson plan.
- Conducted front end needs analysis and training needs assessment for non-profit organization; designed surveys and interviews, analyzed data, created evaluation tools, and recommended training solutions.
- Designed an *Introduction to LinkedIn™* course for final project. Utilized the ADDIE model and the Collins Blueprint to develop the course. Created hand-outs using SnagIt™ and embedded videos within PowerPoint slides.
- Designed training needs assessment for respiratory therapists at St. Joseph's Medical Center. Survey has been published on HealthStream LMS.

Training and Development/Work Experience

FERRIS, BAKER, WATTS, INC., Baltimore, MD 1998-2009
(Acquired by RBC Wealth Management in May 2008)
Trader, Senior Vice-President, Taxable Fixed Income Department

- Communicated daily updates on market conditions, economic news and sales ideas to retail sales force of 250 Investment Executives; improved their understanding of the bond market and the economy; augmented their knowledge and confidence when discussing bonds with investors.
- Trained trading assistants in fundamental product, trading knowledge and use of Thomson Reuters Beta system; new assistants provided support for traders.
- Educated new Investment Executives on department's products and procedures; aided in transition of new sales representatives to the new firm; improved the knowledge and expertise of new representatives.
- Cultivated and established client relationships with branch managers and Investment Executives; championed doing business with the taxable fixed income department by maintaining high standards of customer service, integrity, and respect.

Manager, Vice President, Retail Taxable Fixed Income Department 1986-1998
Recruited to expand and develop the Taxable Fixed Income Department for Baker Watts (acquired by Ferris in 1988).

- Interviewed, trained and developed all new employees; taught fundamentals of taxable fixed income products and trading techniques to all staff; encouraged and motivated new traders to apply knowledge and consistently improve trading skills.
- Educated and introduced new products to sales force; launched new fixed income products.
- Established strong relationships with vendors, branch managers and Investment Executives; visited branches in order to analyze the needs and goals of the retail sales force; designed educational classes and materials, devised appropriate strategies to establish credibility and trust, and organized the department.
- Educated sales force on all taxable fixed income products through conference calls, branch visits, sales ideas and proposed portfolio strategies.
- Prepared and delivered all written and oral communication including daily sales calls, internal publications, client-approved brochures, conference calls and branch presentations to introduce new products and discuss investment strategies.

TECHNICAL SKILLS

Microsoft Word, PowerPoint and Excel

ORGANIZATIONAL AFFILIATIONS

American Society for Training and Development
Chesapeake Human Resources Association

PROFESSIONAL LICENSES

Series 7, 24 and 63