Sam Morgan

Operations lead

London, UK | Contact details omitted from this fictional sample

Profile

Operations lead at a digital-asset custody provider, responsible for client onboarding and reconciliation. Manages four operations analysts and works with compliance, finance and engineering.

Experience

Operations Lead | Example Custody

April 2023 - present

- Coordinate institutional client onboarding, from due-diligence documents to account setup. Track outstanding items with compliance, which retains approval decisions.
- Manage four operations analysts: allocate cases, review daily reconciliation of cash and digital-asset balances, and escalate settlement breaks to finance and engineering.
- Produce a weekly report on case ageing and unresolved exceptions. Maintain the onboarding checklist and handover notes.

Operations Analyst | Example Transfers

September 2020 - March 2023

- Reconciled payments daily and investigated unmatched transactions using Excel and SQL with the finance team.
- Answered client queries on transfer status and wrote the shift handover guide.

Skills

Client onboarding, reconciliation, case management, team supervision, Excel, SQL and process documentation.

Education

BA Business Management | Example University | 2017-2020

Fictional sample. All people, organisations and experience are invented.
Illustrates the writing service; not a real candidate or evidence of client results.