

Ribhi Treish

447 East 12th Street Apt 122, Charlotte, NC 28206
(919) 917-6724, ribhitreish@gmail.com

WORK EXPERIENCE

TIAA – National Contact Center (NCC)

Financial Services Consultant, Charlotte, North Carolina

June 2026-October 2026

- o Guided **retirement plan participants** through **high-volume, phone-based consultations** on cash withdrawals, annuitization and lifetime income options, Required Minimum Distributions (RMDs), and beneficiary designations, ensuring accurate and compliant transaction processing
- o Delivered **foundational education** on TIAA's retirement plans, after-tax investments, insurance products, income options, and investment choices, **helping participants understand their options and make informed financial decisions.**
- o Identified **participants' advice needs** and **scheduled advising sessions with financial consultants**, serving as the first point of contact in TIAA's client service pipeline

Equus Workforce Solutions/NCWorks Career Center

Business Services Consultant, Raleigh, North Carolina

September 2025-March 2026

- o Served as a **strategic workforce advisor to sector-specific employers** across Wake and Johnston Counties, **diagnosing hiring needs/skill gaps** and **aligning them with state-funded solutions** through **in-person and phone-based relationship management**
- o Planned and **coordinated employer hiring events**, job fairs, and direct-hire sessions, supporting interviewing, screening, and offer processes while maintaining flexibility to meet employer timelines and operational needs
- o Developed **new business penetration strategies** through **targeted outreach**, employer **re-engagement efforts**, and cross-center referrals to expand employer participation across priority industries

Charles Schwab

Wealth Consultant Partner, Bethesda, Maryland

September 2024-December 2024

- o Partnered with **two Sr. Wealth Consultants** within the **Ultra High Net Worth Division** managing 215 combined clients to handle **complex client needs** surrounding **transactional requests, TTE (Trust, Tax, and Estate) planning concerns**, account/asset onboarding and offboarding, **needed account maintenance**, and **internal service accommodations**
- o **Uncovered client needs/desires** individually and alongside the Sr. Wealth Consultant utilizing the EDGE communication framework through **numerous client meetings and events, emphasizing the firm's offerings and positioning the firm's mission**
- o Served as the **point of contact** for clients in times of **complex service needs** and the **Sr. Wealth Consultants' absences**
- o **Optimized** the Sr. Wealth Consultant's **book of clients** utilizing **Salesforce, internal analytics tools and organizational tools**

Charles Schwab

Financial Consultant Trainee, Dallas, Texas

September 2023-September 2024

- o Serviced **inbound retirement and brokerage accounts by phone**, resolving requests from **routine maintenance** (address and beneficiary updates, distributions, transfers) to **trade inquiries and trade corrections**, while verifying client identity and following regulatory procedures
- o Ran **outbound retention calls to 30–40 inactive and at-risk clients daily**, re-engaging dormant accounts, reviewing whether enrolled managed solutions still fit client goals, and scheduling consultations with advisors and business partners
- o Supported **targeted outbound campaigns**, using **needs-based conversations** to uncover gaps in client planning and connect clients with the right investment resources and specialists
- o Escalated **complex client concerns** to the appropriate internal partners, documenting cases accurately in CRM to keep follow-up smooth

EDUCATION

Appalachian State University, Boone, NC

Bachelor of Science in Business Administration (BSBA) - Banking and Finance

Minor(s): Leadership Studies and Accounting

CERTIFICATIONS/TECHNICAL SKILLS

Securities Industry Essentials (SIE) - FINRA

July 2022

Series 7 (General Securities Representative) - FINRA

November 2023

Series 66 (Uniform Combined State Law) - NASAA

December 2023

Microsoft Office Suite (Word, Excel, PowerPoint, Teams), Salesforce, Siebel, eMoney, MoneyGuide Pro

NC Life Insurance Producer License – NC Department of Insurance

September 2026

CORE SKILLS

Customer Service: Delivering tactful, empathetic, and solution-driven service to diverse clients.

Account Analysis: Proficient in reviewing and resolving account issues.

Technical Proficiency: Skilled in Microsoft Office Suite, Salesforce, Siebel and data management tools.

LEADERSHIP & INVOLVEMENT

Vice President of Administration, Pi Sigma Epsilon Gamma Xi

December 2021-December 2022

Diversity and Inclusion Director, Pi Sigma Epsilon Gamma Xi

August 2021-December 2021

Resident Assistant, Appalachian State University Housing

August 2020-May 2022

LEAD Workshop Facilitator, App State Community Engaged Leadership Office

August 2020-May 2023