

Daisy Ware

Assistant Director of Operations, Financial Aid

📞 (309) 555-6284

✉️ daisy.ware@example.com

🌐 linkedin.com/example/daisyware

📍 Peoria, IL 61602

STRENGTHS

- 🔍 **Reconciliation judgment**
Compared aid, cash management, and account records during monthly reviews, then traced exceptions until partners had a clear resolution path.
- 👥 **Staff guidance**
Trained counselors through policy changes and unusual cases. Colleagues sought practical direction when a student situation needed careful review.
- 💬 **Service communication**
Translated complex aid rules into clear next steps for students and parents, helping difficult conversations end with confidence.
- ⚙️ **Operational focus**
Reworked queue assignments and handoffs with leadership. Small workflow changes made busy periods easier for staff and students.
- ✅ **Compliance support**
Prepared reconciled records and audit evidence for reporting cycles, giving finance and compliance partners dependable documentation.

SKILLS

Reconciliation

Disbursement accuracy

Cash management

Financial reporting Compliance

Staff supervision

Customer service Data analysis

Policy interpretation

Workflow coordination

Complex case resolution

Fiscal controls

SUMMARY

Financial aid operations professional with five years of higher education experience spanning reconciliation, disbursement review, cash management records, compliance reporting, **workflow coordination**, and student service. Progressed from financial aid advising into operational supervision, leading service teams through recurring aid cycles, complex account research, and escalated cases. Practical knowledge of **accounting procedures**, fiscal controls, **financial management** practices, federal and state reporting, audits, institutional systems, and regulatory interpretation supports accurate operational decisions. Partners with finance, bursar, registrar, information systems, and academic offices to resolve discrepancies and improve service quality. Clear written and oral communication supports students, parents, colleagues, and staff during demanding periods. Brings organized judgment, staff development, and process improvement experience that can strengthen accurate, responsive **financial aid operations**.

EXPERIENCE

Financial Aid Operations Supervisor

Midland Heights College 📅 January 2024 - Present 📍 Peoria, IL

- Supervises **financial aid** service and operations staff supporting student inquiries, disbursement follow up, account research, escalated cases, reconciliation, reporting, training, and workflow improvement across recurring aid cycles.
- Supervised service staff through recurring aid cycles, improving case ownership and dependable student communication.
 - Directed monthly **reconciliation** across aid records, disbursement activity, **cash management** data, and external reports.
 - Reviewed adjustments and **account balances** before **reporting** milestones, catching issues through fiscal control checks.
 - Assembled reconciled records and audit evidence for federal, state, and **institutional reporting** requirements.
 - Trained staff on policy changes, case documentation, service standards, and escalation practices.
 - Mapped communication hub queues and handoffs, reducing avoidable rework during unusual student cases.

Senior Financial Aid Counselor

Riverbend Liberal Arts University 📅 July 2022 - December 2023 📍 Bloomington, IL

- Managed complex student aid cases, interpreted federal, state, and institutional requirements, supported reconciliation and reporting periods, and served as an escalation resource for counselors and finance partners.
- Managed student aid cases involving eligibility, **loans**, disbursement timing, adjustments, and departmental coordination.
 - Researched record discrepancies through transaction histories and documentation, routing corrections through established controls.
 - Translated federal, state, and institutional rules into clear next steps for students and parents.
 - Reviewed exception lists and case records during **reporting** periods, documenting unresolved items for leadership.
 - Guided newer counselors through unusual disbursement and eligibility scenarios using structured case analysis.
 - Prioritized competing case deadlines during peak terms, maintaining reliable service amid changing demand.

Financial Aid Advisor

Lakeview Technical Institute 📅 October 2021 - June 2022 📍 Normal, IL

Supported students through **financial aid** and loan processes, maintained accurate institutional records, investigated routine disbursement questions, and prepared concise documentation for senior review.

Accounting procedures

Student services

Time management

LANGUAGES

English Native

Spanish Intermediate

MY CAREER



● Financial Aid Operations Supervisor at Midland Heights College (2.8 Years)

● Senior Financial Aid Counselor at Riverbend Liberal Arts University (1.4 Years)

● Financial Aid Advisor at Lakeview Technical Institute (8 Months)

- Guided students through aid and loan processes, identifying incomplete requirements before scheduled processing.
- Recorded contacts, eligibility details, and case actions in institutional systems for reliable follow up.
- Compared awards, enrollment status, account activity, and procedures when investigating disbursement questions.
- Applied policies and escalation criteria, preparing concise summaries for senior staff review.
- Validated records against source documentation, correcting data issues through approved office processes.
- Built practical knowledge of regulations, service standards, and cross department coordination during high volume cycles.

PROJECTS

Financial Aid Reconciliation Workflow 📅 2025

Mapped recurring reconciliation steps, exception ownership, documentation needs, and reporting checkpoints to support accurate review across aid and account records.

Communication Hub Queue Review 📅 2024

Reviewed service queues and handoffs with leadership, clarifying assignments and escalation paths for more consistent student case resolution.

LEADERSHIP & AWARDS

- Promoted to Financial Aid Operations Supervisor after progressing through advising and senior counseling responsibilities.
- Selected as an escalation resource for unusual disbursement, eligibility, and student account cases.

EDUCATION

Bachelor's Degree in Business Administration

Illinois State University 🎓 GPA: 3.5 📅 2021 📍 Normal, IL

Coursework: *Accounting procedures, financial management, business communications, data analysis*

CERTIFICATIONS

- NASFAA U Credential, Cash Management 📅 2025
- NASFAA U Credential, Professional Judgment 📅 2024

TECHNICAL SKILLS

- **Financial Aid Systems:** Student aid records, disbursement records, account activity
- **Reconciliation Tools:** Exception lists, transaction histories, source documentation
- **Reporting Systems:** Federal reporting, state reporting, institutional reporting
- **Accounting Practices:** Accounting procedures, fiscal controls, account balances
- **Cash Management:** Cash management records, disbursement activity, cash controls
- **Compliance Operations:** Audits, regulatory compliance, policy documentation
- **Case Management:** Escalated cases, case documentation, follow up records
- **Data Analysis:** Data comparison, discrepancy research, record validation
- **Service Operations:** Communication hub, service queues, workflow handoffs
- **Staff Development:** Staff training, work review, assignment coordination

PROFESSIONAL AFFILIATIONS

- Illinois Association of Student Financial Aid Administrators, Professional Development Participant.
- Higher education financial aid operations community, participant in cross department service collaboration.

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST