



Heaven Desai

Financial Aid Specialist

☎ (919) 555-4628 ✉ heaven.desai@example.com

🌐 [linkedin.com/example/heavendesai](https://www.linkedin.com/example/heavendesai) 📍 Raleigh, NC 27601

STRENGTHS

- 🔍 **Case Resolution**
Resolved difficult eligibility questions by comparing records, guidance, and documents. Students received clear next steps and staff gained confidence in decisions.
- 💬 **Student Advising**
Explained borrowing, repayment, and cost decisions in plain language. A careful conversation often turned uncertainty into a workable enrollment plan.
- ♥️ **Compliance Records**
Built complete case notes and audit ready files through daily processing work. Reviewers could follow decisions without chasing missing context.
- ☰ **Queue Management**
Prioritized incomplete files and registration risks through Banner and Slate. Teams saw smoother handoffs during demanding peak term periods.
- 👥 **Campus Collaboration**
Worked across accounts, registration, enrollment, and student success teams. Shared context early when financial requirements threatened student progress.

SKILLS

Financial Aid Processing FAFSA

ISIR Verification

Award Packaging Direct Loans

SAP R2T4

Professional Judgment Title IV

FERPA Banner Financial Aid

Slate CRM Reconciliation

Financial Literacy

SUMMARY

Financial aid professional with eight years of higher education experience supporting undergraduate, graduate, doctoral, online, adult, accelerated, and nontraditional learners. Provides clear guidance on **cost of attendance**, grants, scholarships, **federal Direct Loans**, state aid, institutional funding, repayment, budgeting, and financial planning. Reviews FAFSA and ISIR records, verification, C flags, comment codes, rejected records, conflicting information, corrections, SAP, enrollment changes, R2T4, **professional judgment**, and special circumstances. Works confidently in **Ellucian Banner Financial Aid**, Slate CRM, COD, NSLDS, and FAA Access. Maintains accurate, audit ready files while resolving cases, coordinating with campus partners, protecting FERPA information, and supporting timely enrollment decisions. Brings thoughtful judgment, careful documentation, and a student centered approach that can strengthen service quality and financial readiness.

EXPERIENCE

Senior Financial Aid Specialist

Piedmont Metropolitan College 📅 July 2023 - Present 📍 Raleigh, NC

Leads financial aid processing for online undergraduate, graduate, and doctoral populations. Owns complex case review, award packaging, enrollment adjustments, compliance documentation, queue priorities, and cross campus coordination through Banner and Slate. Supports timely decisions that protect enrollment continuity and student trust.

- Reviewed ISIR records, **C flags**, **comment codes**, and rejected files in Banner for accurate eligibility decisions.
- Packaged Direct Loans, grants, scholarships, and **outside resources** using enrollment intensity and **cost of attendance**.
- Completed SAP, withdrawal, nonattendance, **R2T4**, **post withdrawal**, and professional judgment reviews within delegated authority.
- Used Slate campaigns and Banner queues to reach registration risk students before accelerated term starts.
- Prepared audit ready records, reconciliations, and system notes for quality review and corrective follow up.

Financial Aid Counselor

Carolina Graduate Institute 📅 June 2021 - June 2023 📍 Durham, NC

Advised graduate, doctoral, adult, and accelerated learners through borrowing decisions, **eligibility** reviews, enrollment changes, and completion milestones. Managed high volume processing queues while partnering with student accounts, registration, academic programs, and student success teams to resolve barriers before enrollment deadlines.

- Counseled graduate and doctoral learners on borrowing limits, **repayment**, program costs, and responsible loan planning.
- Processed FAFSA, ISIR, **verification**, Direct Loans, scholarships, and **institutional aid** through documented queues.
- Resolved eligibility discrepancies using federal guidance, enrollment records, student data, and supporting documentation.
- Reviewed **repeated coursework**, adds, drops, withdrawals, and intensity changes for accurate award adjustments.
- Delivered virtual appointments for **multiple term programs**, translating requirements into clear student action steps.

Financial Aid Specialist

Triangle Community College 📅 July 2019 - May 2021 📍 Cary, NC

LANGUAGES

English Native

Spanish Intermediate

MY CAREER



- Senior Financial Aid Specialist at Piedmont Metropolitan College (3.2 Years)
- Financial Aid Counselor at Carolina Graduate Institute (2 Years)
- Financial Aid Specialist at Triangle Community College (1.8 Years)
- Financial Aid Assistant at Coastal State College (11 Months)

Processed traditional and online aid files from FAFSA review through award readiness. Managed document queues, verification, SAP monitoring, student counseling, reconciliation, and escalation work while protecting confidential records and supporting registration progress during peak periods.

- Processed **FAFSA**, ISIR, verification, **packaging**, and federal eligibility reviews for online and traditional students.
- Maintained document queues, checklists, and case notes that moved incomplete files toward award readiness.
- Guided students through **Master Promissory Notes**, **entrance counseling**, cost of attendance, grants, and loans.
- Monitored **SAP** and enrollment changes, explaining requirements and routing appeals beyond delegated authority.
- Reconciled application, enrollment, and document discrepancies while preserving **FERPA** compliant handling of sensitive information.

Financial Aid Assistant

Coastal State College 📅 July 2018 - June 2019 📍 Wilmington, NC

Supported federal, state, institutional, and external funding processes for prospective and continuing students. Maintained document accuracy, contact records, routine reports, and service coordination while learning core financial aid operations and FERPA compliant record handling.

- Reviewed documents, indexed records, and routed files for **verification**, packaging, or **eligibility** review.
- Explained **FAFSA** steps, **cost of attendance**, grant requirements, loan requirements, and available student resources.
- Tracked missing information and documented phone and email contacts in student records.
- Prepared routine file reports and identified mismatches requiring counselor review during busy enrollment periods.
- Protected confidential financial information under FERPA while coordinating account questions with student accounts.

PROJECTS

Online Aid Readiness Outreach 📅 2024

Partnered with enrollment teams on a focused outreach effort for online students with incomplete aid files. Shared clear next steps through Slate and Banner records, helping students address requirements before registration milestones.

Graduate Borrowing Guidance 📅 2022

Created a practical advising approach for graduate and doctoral learners comparing program costs, loan limits, repayment choices, and outside resources. Conversations helped students connect borrowing decisions with longer term financial plans.

LEADERSHIP & AWARDS

- NASFAA U Credential achievement recognized for focused verification practice in 2024.
- NASFAA U Credential achievement recognized for strong SAP knowledge in 2023.
- Selected for trusted case review and peer support across complex student aid queues.

EDUCATION

Bachelor's Degree in Business Administration

University of North Carolina Wilmington 🎓 GPA: 0 📅 2018 📍 Wilmington, NC

Coursework: Financial management, business law, organizational behavior, accounting

CERTIFICATIONS

- NASFAA U Credential, Verification 📅 2024
- NASFAA U Credential, Satisfactory Academic Progress 📅 2023
- Federal Student Aid Fundamentals Training 📅 2022

TECHNICAL SKILLS

- **Financial Aid Systems:** Ellucian Banner Financial Aid, Slate CRM, FAA Access
- **Federal Aid Platforms:** COD, NSLDS, Federal Student Aid
- **Application Processing:** FAFSA, ISIR, Verification
- **Award Administration:** Direct Loans, Grants, Scholarships
- **Eligibility Review:** SAP, R2T4, Professional Judgment
- **Student Counseling:** Entrance Counseling, Exit Counseling, Master Promissory Notes
- **Compliance Standards:** Title IV, FERPA, Confidentiality
- **Records Management:** Audit Ready Files, Case Notes, Document Checklists
- **Enrollment Adjustments:** Adds, Drops, Withdrawals, Nonattendance
- **Funding Programs:** OSHER, VTAG, State Aid, Institutional Aid
- **Financial Planning:** Cost of Attendance, Budgeting, Repayment Planning
- **Quality Operations:** Reconciliation, Quality Control, Exception Tracking

PROFESSIONAL AFFILIATIONS

- NASFAA professional development participant focused on federal student aid practice.
- Higher education financial aid peer network contributor supporting shared case research.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST