AUSTIN RICKNER

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Professional Summary

Business Operations and Relationship Manager with 15+ years of experience in business execution and key account management. I focus on simplifying complex data to drive growth and streamlining workflows in high-pressure environments. I am proven in my ability to optimize operations and manage critical stakeholder relationships to ensure organizational success

Work History

Business Development Analyst, 12/2023 - Current

Morgan Stanley – Tulsa, OK

- Served as the foundational member of a core team, sustaining operational continuity while scaling AUM from $500M to $1.5B and expanding headcount from 2 to 8.
- Steer strategic growth as a member of the Branch Leadership Committee, representing team interests and driving cross-departmental initiatives across the wider Morgan Stanley branch.
- Customized and managed investment portfolios for high-net-worth clients, consistently hitting growth targets and maintaining high retention by aligning assets with specific risk and return goals.
- Facilitate the seamless execution of multi-million dollar transactions, managing the end-to-end process for complex financial matters while maintaining a high-touch service model for high-net-worth individuals.
- Cultivate long-term relationships with key clients, acting as a central point of contact to resolve complex operational challenges and ensure seamless execution of $100K+ transactions.
- Navigate high-stakes crisis management scenarios, proactively identifying risks and implementing corrective measures that strengthen client trust and institutional stability during market volatility.

Sr. Registered Client Relationship Analyst, 03/2018 - 12/2023

Morgan Stanley – Tulsa, OK

- Translated sophisticated investment concepts into actionable insights, contributing to $25M+ in annual "held-away" asset consolidation by providing the technical clarity necessary for clients to move external accounts to the team's management.
- Directed cross-functional workflows across internal teams to meet specialized client requirements, serving as the primary point of accountability for the delivery of high-stakes financial services.

- Demystified complex investment mechanics for a diverse portfolio of 150+ families, maintaining a near-perfect execution record on high-stakes transactions through precise technical communication and guidance.
- Nurtured high-trust relationships with private wealth principals by delivering a concierge-level service experience, resulting in a consistent flow of organic client referrals and long-term portfolio stability

Registered Client Associate, 09/2014 - 03/2018
Merrill Lynch – Tulsa, OK

- Directed the end-to-end onboarding lifecycle for 200+ high-value accounts, maintaining full quality control over complex asset transfer protocols and regulatory documentation to ensure zero-defect compliance
- Orchestrated 10+ high-impact engagement initiatives and seminars annually, serving as the lead strategist to expand market presence and drive a 17% increase in retention and referrals
- Oversaw an extensive scope of implementations and management mandates, maintaining meticulous oversight of performance metrics to ensure comprehensive alignment with key risk profiles

Internal Wholesaler - Annuities, 02/2012 - 09/2014
Jackson National – Nashville, TN

- Drove over $45M in annual annuity production by partnering with financial advisors to identify and implement protected-growth strategies, resulting in a 20% year-over-year increase in territory market share
- Developed and managed a high-performing network of 150+ professional partners, driving loyalty through technical advisory and streamlined issue resolution
- Leveraged CRM analytics to manage a pipeline of 400+ active leads, transforming data into targeted outreach strategies that increased advisor engagement by 15% across a multi-state region
- Combined high-volume sales production with rigorous technical discipline, earning comprehensive industry licensing to ensure all territory activities and advisor consultations met the highest standards of regulatory compliance

SKILLS

- Complex Issue Resolution
- Crisis Management & Mitigation
- Strategic Stakeholder Management
- Business Process Optimization
- Executive-Level Communications
- Operational Efficiency & Scalability
- Cross-Functional Team Orchestration
- Data-Driven Strategy Execution
- Market Trend Analysis
- Change Management & Adaptability

Education

Bachelor of Science: Marketing, 01/2009

Oklahoma State University - Stillwater, OK

LICENSES

FINRA Series: 7, 63, 65