

Dedicated and detail-oriented professional with proven expertise in client onboarding, account management, escrow services, and commercial underwriting.

Remarkable efficiency in driving strategic transaction efficiencies, ensuring meticulous document reviews, and fostering seamless communication between stakeholders. Proven ability to close multi-billion dollar transactions and amplify revenue generation. Adept at streamlining transactional processes and delivering superior client service. Track record of achieving optimal compliance, minimizing corporate risks, and optimizing profitability. A self-starter with an indomitable spirit and a relentless drive for excellence. Instrumental in managing financial paperwork, ensuring streamlined transactions, maintaining relationships, and implementing beneficial changes.

Areas of Expertise

- Transaction Management
- Escrow Services Administration
- Stakeholder Communication
- Settlement Statement Preparation
- Financial Disbursement Supervision
- Contractual Compliance Oversight
- Closing Document Verification
- High-net-worth Settlements
- Real Estate Tax Reconciliation
- Purchase & Sale Agreement Analysis
- Process Efficiency Enhancement
- Risk Minimization Strategies
- Client Relationship Management
- Legal Document Interpretation
- Closing Obstacle Rectification
- Fund Collection & Verification
- Escrow Account Maintenance
- Wire Transfer Coordination
- Operational Issue Resolution
- Data Gathering & Analysis
- Advisor Support & Collaboration

Career Experience

Lima One Capital, Dunwoody, GA
Multifamily Closing Specialist

2024 Jan-July

Assisted the Lima One Commercial Real Estate division by providing loan administration services to the Multifamily Operations team including the review of commercial/multifamily real estate loan documents to ensure accuracy and compliance with closing procedures. Coordinated closing and delivery phases of active loans to ensure requirements are satisfied within a specified time-frame while maintaining internal checklists in real-time. Point of contact between all parties involved in the funding transaction. Requested, reviewed and approved pro forma title policies, settlement statements or HUD's prior to closing.

- Oversaw the closing of over 25 loans with an estimated loan value of \$65,000,000.00.
- Reviewed deliverables for completion including third-party documents and reports, title insurance, property, and liability insurance, and borrowing entity structures.
- Partnered with underwriters and attorneys to identify title, property insurance, vesting, or other issues that require analysis and resolution prior to approval or documentation.
- Performed other related duties as assigned including special projects, audits, and quality control oversights.

Advantage Title Group Agency LLC, Melville, NY
Escrow Officer

2021 – 2023

Orchestrated real estate closing processes in alignment with various stakeholder requirements, including contractual obligations, lender guidelines, and company policies. Mastered the intricacies of escrow proceedings, executing title transfers in accordance with real estate contracts and lender stipulations. Served as the principal liaison for all parties involved in respective closing transactions. Directed the initiation of wire transfers and issuance of checks at closing stages. Administered Settlement Services for designated transactions, while prorating taxes, consolidating third-party payments, and confirming escrow funds prior to disbursement.

- Closed over 60 transactions with an estimated insured value of \$150,000,000.00 Million, and revenue generation of \$3 million.
- Elevated process efficiency by meticulously reviewing and validating the accuracy of closing and recordable documents.
- Fortified financial security by ensuring the collection of all required closing funds in escrow prior to disbursement.
- Enhanced operational quality by generating and evaluating title invoices, optimizing financial and contractual compliance.

Spearheaded high-net-worth commercial real estate settlements across multiple districts nationwide. Oversaw critical timelines, utilizing keen business acumen to safeguard company integrity and optimize profitability. Unblocked transaction obstacles to accelerate closings and elevate operational efficiency. Orchestrated communication among transaction stakeholders, underwriters, clients, legal teams, and vendors. Vetted and approved comprehensive closing packages, including an array of financial and legal documents. Supervised fund disbursement, daily payment processing, and escrow account maintenance. Scanned and interpreted Purchase/Sale and Escrow Agreements to ensure complete contractual compliance. Managed remittance procedures for utility fees and taxes, confirming successful payments.

- Expedited 65% of National Division closings by taking charge of settlement statement preparation.
- Minimized corporate risk and boosted returns by enforcing stringent deadline management and business judgment.
- Improved client responsiveness by resolving all queries and concerns promptly.
- Enhanced transaction efficiency by identifying and rectifying roadblocks, thereby preventing closing delays.
- Ensured 100% compliance with contractual terms and conditions through meticulous review of Purchase/Sale and Escrow Agreements.

Supported Underwriting Team in executing Commercial Title Insurance orders and finalizing real estate transactions. Facilitated seamless information flow among lenders, buyers, sellers, and service companies to expedite settlement. Organized closing schedules while aiding Title Closers with revisions; updated municipal searches and continued orders for upcoming closings. Assessed the efficacy of title commitments and policies aimed at ensuring accuracy and completeness. Cleared titles, coordinated lien payoffs, and reconciled real estate tax balances. Administered final settlement services and generated accurate title bills.

- Contributed to the largest transaction in company history—a \$5.4 billion cash sale, yielding a seven-figure premium.
- Enhanced transaction velocity through effective communication with multiple stakeholders, including lenders and real estate offices.
- Elevated accuracy of title commitments and policies by conducting meticulous reviews.
- Streamlined settlement processes by organizing and verifying comprehensive closer packages.

Managed single and multi-site commercial real estate closings, aligning diverse transaction elements for successful completion. Advised clients, legal teams, and third-party agents to foster a cohesive transaction environment. Oversaw title request processing for both insured and non-insured cases with a keen focus on expediting service delivery. Secured title examinations from localized branches to confirm property histories and legal standings. Drafted and submitted internal operational documents, records, and legal correspondences, ensuring timeliness and compliance.

- Elevated operational efficiency by identifying and implementing solutions for recurring transaction issues.
- Optimized financial transactions by proficiently utilizing Citibank Insight for wire transfers.
- Achieved timely recordation of closing documents with county clerk offices, ensuring legal compliance and client satisfaction.
- Streamlined post-closing processes, including escrow account reconciliation and investment according to client specifications.

Education

Bachelor of Science in Business Administration and Psychology
Herbert H, Lehman College, Bronx, NY

Licenses

Active Georgia Notary Public
Active Georgia Real Estate License