

# Russell C. Bolin II

## Summary

A highly knowledgeable and motivated condo owner with extensive experience understanding HOA rules and regulations. Excellent communication and organizational skills. Demonstrated ability to successfully manage and lead teams, solve complex problems and create positive outcomes. Possesses a deep understanding of business operations, decision-making, and problem-solving. Skilled in overseeing the implementation of effective policies and procedures for a diverse range of organizations.

**Independent Insurance Agent** AmeriLife Grupo LatinoAmericano de Seguros 2014 – Present

As a Sr. Wealth Advisor, I have a broad and deep understanding of sophisticated wealth management practices and investment strategies, including extensive impact/mission related investing expertise. Due to my broad knowledge in the wealth management arena, I am often called to consultant with and oversee my client's other advisors, analysts, tax experts, and administrators in providing investment management, financial planning, and other financial services.

**Regional Property Manager** Alliance Residential Management 2001 – 2013

As a Regional Property Manager I travelled to various distressed apartment communities where I presented monthly reports to the Owners, prepared annual budgets, collected, posted and deposited income, and generated PO's and submitted invoices for payment. My role included addressing resident concerns in a timely manner to ensure resident satisfaction. This included developing and implementing resident retention programs, resident functions, special promotions, and monthly newsletters.

**Maintenance Supervisor** Alliance Residential Management 1999 – 2001

Solely responsible for all on-site repairs and maintenance requests pertaining to HVAC, plumbing, electrical, carpentry & drywall, painting, irrigation system, and grounds. Dealt directly with vendors, solicited bids from contractors and supervised all contracted work performed on the property. Checked all fire and safety equipment to assure it was in working order and in compliance with all applicable city, state, and federal codes. Ensured that all resident service requests were responded to properly and expeditiously.

## Personal Life

Since February of 2019 my wife and I own and live at On Top of the World. We have two adult children, a daughter in Virginia and a son in Ohio. I enjoy traveling with my wife, crossword puzzles, and playing card games. Prior to 1998 my wife and I owned a small business in Ohio.

During my entire work life I have demonstrated an ability to apply principles of logical thinking to define problems, collect pertinent data, establish facts, draw valid conclusions and initiate an appropriate course of action. This also included originating ideas, images and goals and effectively conveying same to diverse groups of individuals.

I embrace the principles and values of honesty, integrity, competence, tenacity, enthusiasm, creativity, drive, and professionalism.

## Education, Licenses, and Certifications

Otterbein University: Bachelor of Arts

Florida: 0215 Insurance License, Pool & Spa Certification, CAM certified

Ohio: Boiler Operator License, Pesticide License, HVAC License, 410-A Refrigerant Certification

Federal: EPA Universal Refrigerant Handling Certificate