

Profile

Which Boards would you like to apply for?

Industrial Facilities and Pollution Control Financing Authority: Submitted

Please select your first Board preference: \*

☒ Apex Planning and Zoning Board

Please select your second Board preference: \*

☒ Industrial Facilities and Pollution Control Financing Authority

Please select your third Board preference: \*

☒ None Selected

Please select your fourth Board preference: \*

☒ None Selected

Please select your fifth Board preference: \*

☒ None Selected

Please select your sixth Board preference: \*

☒ None Selected

Kaleb		Wright
First Name	Middle Initial	Last Name

343 Anterbury Drive		
Street Address	Suite or Apt	
Apex	NC	27502
City	State	Postal Code

What district do you live in?

None Selected

Mobile: (434) 258-3266	Home: (434) 258-3266
Primary Phone	Alternate Phone

kalebbryan@gmail.com
Email Address

Merrill Lynch	Financial Advisor
Employer	Job Title

**If you live in an Extraterritorial Jurisdiction Area, select Yes:**

☐ Yes ☒ No

**In order to assure countywide representation, please indicate your place of residence:**

☒ Apex

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## Interests & Experiences

**Why are you interested in serving on a Board or Commission?**

As a long-time resident of Wake County, it is my honor and civic duty to be a contributing voice for the future vision of this community. As a young professional, I seek to sharpen my already established leadership skills by working alongside other successful and enthusiastic leaders in this community. I feel strongly that my background in business, finance, and law enforcement have prepared me to act in the best interest of our community.

## Work Experience

Merrill Lynch -- Financial Advisor (Mar 2023-Pres) Oakbridge Financial Group --Financial Advisor (May 2021-Mar 2023) ICA (DHS Contractor) --Assistant Shift Commander (Jan 2018-Aug 2021) Dominos LLC --General Manager (Dec 2012-Jul 2018)

## Volunteer Experience

Financial Manager -- The Branch NC (501c3) Budget Consultant --The Lighthouse Community Center Server/Support Staff --Raleigh Rescue Mission

## Education

B.S - Business Administration and Management --Cognate in Finance Master's in Financial Analysis --Expected graduation May 2026

## Comments

[KalebWright\\_Resume.docx](#)

Upload a Resume

[KW2425\\_PDF.pdf](#)

If you have another document you would like to attach to your application, you may upload it below:

Please upload a file

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## Demographics

Date of Birth

Kaleb Wright

**Gender \***

☒ Male

**Ethnicity \***

☒ Caucasian

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**Other**

**How did you become aware of Wake County volunteer opportunities?**

☒ County Website

**If you selected "Other" above, how?**

Please upload a file

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**ETHICS GUIDELINES FOR COUNTY ADVISORY BOARDS AND COMMISSIONS**

By submitting this electronic application, if appointed, I pledge by my signature below that I have read and will comply with the ethics guidelines for advisory boards and commissions as adopted by the Wake County Board of Commissioners, found [here](#).

## Profile

Detail-oriented, analytical Financial and Budget professional with 12+ years of experience in financial planning, forecasting, and budget management. Proficient in analyzing complex financial data to drive strategic decision-making and optimize budget allocation. Skilled in developing and implementing financial models to improve cost efficiency and profitability. Strong ability to identify financial risks and opportunities, providing insightful recommendations for mitigation and growth. Experienced in preparing detailed financial reports and presentations for stakeholders at all levels of the organization. Solid understanding of financial regulations and compliance standards, ensuring accuracy and integrity of financial data. Proven track record of delivering accurate and timely financial analysis in fast-paced environments.

## Areas of Expertise

- Community Outreach & Engagement
- Mentorship & Training
- Crisis Management
- Cost Analysis
- Operational Efficiency Improvement
- Financial Analysis & Reporting
- Strategic Planning
- Data Analysis
- Client Acquisition & Retention
- Portfolio Management
- Budgeting & Forecasting
- Communication & Collaboration

## Career Experience

### Merrill Lynch, Raleigh, NC

Mar 2023 - Present

Merrill Lynch Solutions Advisor

Engage with community and internal networks to foster an inclusive culture and expand client base. Drive sales of consumer and investment products by executing targeted outreach strategies and leveraging natural market opportunities. Optimize personal efficiency through strategic use of scheduling tools and Customer Engagement Workflow (CEW). Provide mentorship and support to newly appointed Merrill Financial Solutions Advisors, enhancing team performance and onboarding success.

- Developed a pipeline management system using Excel, enhancing regional performance tracking and forecasting.
- Consistently met monthly client acquisition targets, averaging \$300,000 of Assets Under Management (AUM).
- Implemented innovative outreach techniques that contributed to a robust client portfolio and sustained revenue growth.
- Played a pivotal role in the professional development of junior advisors, leading to improved team dynamics and productivity.
- Championed diversity and inclusion initiatives, positively impacting community relations and brand reputation.

### Oakbridge Financial Group, Raleigh, NC

May 2021 - Mar 2023

Financial Advisor

Directed team meetings to enhance client onboarding, advisor training, and operational efficiencies. Pioneered the adoption of strategic templates for financial professionals to optimize client interactions. Recruited, mentored, and integrated a diverse roster of newly licensed advisors, leveraging alumni networks and professional affiliations. Provided comprehensive support and technological acumen to advisors in the initial stages of their careers.

- Consistently surpassed sales goals, cultivated client relationships, and broadened market presence through strategic networking and referrals.
- Guided new advisors, boosting their practice development through joint meetings and dedicated mentorship.

- Developed and implemented process improvement tools, including pipeline management and compliance spreadsheets, to streamline office operations.
- Enhanced client service delivery by creating and introducing strategy implementation guides.

### **Immigration Centers of America, Farmville, VA**

**Jan 2018 - Aug 2021**

Assistant Shift Commander

Managed the safety and security of a detention facility, ensuring humane treatment of inmates and adherence to established protocols. Mentored junior officers to foster team cohesion and professional growth. Enforced facility standards, demonstrating exemplary conduct and setting behavioral expectations. Orchestrated task prioritization and time management in a dynamic, high-stress environment. Upheld a commitment to ongoing education in security practices and industry standards, enhancing service quality.

- Directed prompt, decisive action during emergency situations to safeguard all individuals within the facility.
- Oversaw crisis negotiations, maintaining order during high-tension situations amidst the COVID-19 pandemic.
- Developed and disseminated custom spreadsheets detailing employee benefits, fostering informed decision-making regarding 401(k) investments, health coverage options, and life insurance impacts.
- Initiated and led a comprehensive review of facility procedures, identifying and implementing process improvements for increased efficiency and security.

### **Domino's Pizza LLC, Forest, VA**

**Dec 2012 - Jul 2018**

General Manager

Led team of professionals to surpass sales goals and maintain exceptional levels of hospitality. Interviewed, trained, and developed staff, fostering a culture of diversity and inclusion. Managed financial aspects of operations, including budgeting, balancing, and forecasting to align with profitability objectives. Orchestrated community engagement through events and philanthropy, enhancing brand presence and fostering goodwill. Provided mentorship to other franchise locations, ensuring consistency in quality and service.

- Youngest to attain General Manager position, steering flagship store to average \$12,000 in weekly sales.
- Raised over \$10,000 for charitable causes, earning the Domino's Charity Champion award.
- Achieved membership in the Million Dollar Club by reaching \$1MM in annual sales.
- Secured 4 consecutive 5-star OER ratings, demonstrating adherence to corporate standards and operational excellence.

## **Voluntary Experience**

**Finance Manager, The Branch NC, 501c3, Apex, NC, Aug 2022- Dec 2023**

**Budget Consultant, The Lighthouse Community Center, 501c3, Lynchburg, VA, Mar 2021 -Dec 2023**

**Server & Support, Raleigh Rescue Mission, 501c3, Raleigh, NC**

## **Education**

**Master of Financial Analysis (MFA)**

College for Financial Planning, Expected Graduation Dec 2026

**Bachelor of Science in Business Administration & Management - Finance**

Liberty University, 2022

## **Professional Training**



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## Professional Training

Series 7 & Series 66

Wealth Management & CRM