TRAVIS RAY, CFP®

FINANCIAL PLANNER & RIA TECH CONSULTANT

CONTACT

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Greensboro, North Carolina

EDUCATION & CREDENTIALS

CFP® 2022
CFP Board of Standards

Executive Certificate in Financial Planning 2021
Duke University

B.A. Economics 2010
University of North Carolina at Chapel Hill

CORE VALUES

Efficiency
Make the most of limited resources by streamlining processes, optimizing workflows and being efficient to maximize output.

Intelectual Curisosity
Continuously adapting to new information, ideas and strategies in order to provide the best possible solutions and advice.

Abundance of Success
Foster an environment of collaboration and trust, where everyone is held accountable to their commitments and encouraged to reach their highest potential.

TECH EXPERTISE

Envestnet Tamarac, riskalyze, CO-PILOT, CANVAS, Advyzon, holistiplan, RightCapital, Elements

PROFILE

Experienced financial professional with a focus on enhancing operational efficiency for Registered Investment Advisors (RIAs). I leverage technology to streamline back-office functions and boost productivity. Leading operations, support, and consulting teams has honed my skills. As an independent consultant, I utilize a wide array of software tools to deliver hands-on, immersive solutions tailored to diverse business needs. I design innovative, customized solutions that foster collaboration and trust. For expert guidance in streamlined processes and scalable workflows, I am the consultant you need.

WORK EXPERIENCE

Lead Consultant

By Design Consulting Services 2023 - Present

- Evaluate and refine operational workflows to pinpoint and address inefficiencies, implementing strategic improvements that enhance performance and reduce redundancy;
- Collaborate with team members across departments to align operational strategies with the firm’s long-term goals, driving cohesive growth and enhanced success.
- Develop and implement comprehensive operational processes for RIAs to streamline client onboarding, portfolio management, and internal procedures, ensuring efficient and smooth operations.

Senior Trading Consultant

Envestnet | Tamarac 2017 - 2022

- Collaborated with RIA firms to examine trading procedures and business processes to identify and implement scalable workflows while adopting new technology.
- Developed, outlined, and delivered presentation and training topics for national user conferences, Tamarac University, and small group sessions.
- Served as subject matter expert during the sales process to assist with signing new clients to the platform.
- Established the Raleigh consulting team as the founding trading consultant.

Client Service Manager

Envestnet | Tamarac 2014 - 2017

- Managed multi-site client facing support teams that specialized in delivering high quality support for Tamarac's suite of products.
- Recruited, trained, and coached Client Service Associates and Consultants.
- Analyzed team metrics to optimize productivity and utilization rates.
- Oversaw client relationships to ensure a successful client experience.
- Worked closely with development team to triage reported defects, assist with identifying root issues and prioritizing resolutions.
- Served as the first client product support team manager in Raleigh.

Client Service Associate

Envestnet | Tamarac 2012 - 2014

- Developed and maintained a high level of expertise in the ever-changing Tamarac Reporting and Tamarac Trading products – both having an aggressive enhancement cycle.
- Ensured prompt resolution of client inquiries and technical requests.
- Established the Raleigh product support team as the first CSA.