

# David Ortuño

99 Bridge Street  
Phoenixville, PA 19460

Phone: (212) 845-9613

[david29@quijote.us](mailto:david29@quijote.us)

## KEY EXPERTISE

<b>Summary</b>	<ul style="list-style-type: none"><li>◇ Analytical Skills</li><li>◇ Policy and Procedure Development</li><li>◇ Management &amp; Financial Reporting</li><li>◇ Project/Product Implementation and Integration</li><li>◇ Cross-Functional Team Training</li><li>◇ Web Development</li><li>◇ Marketing Material/Email Campaigns Deployment</li><li>◇ Support Building/Maintenance</li></ul>
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## SKILLS SUMMARY

<b>Programming Languages</b>	ASP.net, C#, HTML5, AJAX, XML/XSLT, Visual Basic, VB Script, JavaScript, CSS
<b>Web Tools</b>	Microsoft Visual Studio .NET 2013 for Desktop and for Web, Dreamweaver
<b>Graphic Design Tools</b>	Adobe Photoshop Creative Suite 6. Microsoft Image Composer
<b>Web Administration</b>	IIS7 servers with IIS Manager, WebMatrix
<b>DBMS</b>	Microsoft SQL Server Management Studio 2012
<b>Operating Systems</b>	Microsoft Windows 8, MAC OS X
<b>Languages</b>	Bilingual in Spanish/English
<b>Other</b>	Microsoft Office 365, QuickBooks, MS-Office 2008 for MACS
<b>Licenses</b>	Accident and Health - Life and Fixed Annuities Producer in NJ, PA Property and Casualty Licensed in PA Mortgage Loan Originator NMLS ID: 39608
<b>Virtual Resume</b>	<a href="http://davidortuno.es/resume">http://davidortuno.es/resume</a>

## PROFESSIONAL EXPERIENCE

<b>Date</b>	November 2013 - Present
<b>Company</b>	Customers Bank Phoenixville, PA
<b>Title</b>	Ellie Mae Encompass® 360 Administrator/ Mortgage Operations
<b>Job Description</b>	<ul style="list-style-type: none"><li>○ Implement and Deploy Encompass products with customized Business Rules and Configurations</li><li>○ Provide system integrations from the different vendors to create/facilitate their workflow with Encompass</li><li>○ Provide support/organize Training and Webinars to all the Bank's Branches and about 225 Loan Officers.</li><li>○ Initialize and maintain company and user setups, personas and roles.</li><li>○ Maintain Loan Setup settings as applicable to ongoing business needs.</li><li>○ Maintain complete document library, build custom documents as needed and maintain eFolder settings to ensure preservation of a complete paperless environment with requisite document retention.</li><li>○ Compile and maintain loan program directory in collaboration with Secondary Marketing to ensure accurate guidelines, program codes, Loan Template settings and document sets are available for all loan products.</li><li>○ Manage help desk requests from internal users while troubleshooting issues and clearing tickets in a timely manner - accelerating items to Ellie Mae tech support as needed. Develop working relationships with technical support department at Ellie Mae including professional services group,</li></ul>

	<p>EPPS, Encompass® 360 Closer and Mavent compliance affiliated service departments.</p> <ul style="list-style-type: none"> <li>○ Function as top level support for all roles and end users.</li> <li>○ Provide Encompass® 360 process, feature, and workflow information to the Technical Writers for proper documentation of these; this includes changes to the system, updates, and new features.</li> <li>○ Identify training needs on Encompass® 360. Organize and facilitate Encompass® 360 end user training as needed; this includes new employee Encompass® 360 training, training on changes, new features, and refresher training as required, facilitates all job-aids.</li> <li>○ Create and maintain report library and build custom reports as necessary for business groups.</li> <li>○ Maintain business rules for data entry, workflow progression and regulatory compliance as requested by each business group.</li> <li>○ Prepare reporting for regulatory examination process including electronic submission of data to regulatory agencies.</li> <li>○ Synchronize all Loan Data and Fields in the Encompass Reporting Database with the SQL Server Replication Database owned by the bank with server cron jobs to build queries and customized detailed Reports.</li> </ul>
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<b>Date</b>	January 2001 - Present
<b>Company</b>	Philly Techies Philadelphia, PA
<b>Title</b>	Web Developer/Server Administrator
<b>Job Description</b>	<ul style="list-style-type: none"> <li>○ Designs and develop software solutions and intranet Web applications for Marketing and Sales using the Tools described above</li> <li>○ Implements Membership area solutions for clients' web sites</li> <li>○ Facilitates Social Media Platforms and Builds Communities</li> <li>○ Designs Banking/Lending components and solutions for clients; such as On-line Applications, Application statuses, and distribution of communications on Mortgage and Insurance software</li> <li>○ Responsible for the coordination of training seminars and special projects. Specific responsibilities included the designing, development, scheduling and registering of training materials and workshops, including the writing of company's policy guidelines and training manual</li> <li>○ Projects: <ul style="list-style-type: none"> <li>▪ Email Campaigns. Assists the Company Marketing Department in creating company's Web sites, Monthly Newsletters, and Flyers;</li> <li>▪ IT Help Desk Support. Created the company's on-line IT Help Desk and trained the staff on monitoring issues submitted via tickets, email and phone to ensure quality customer service to its users</li> <li>▪ Survey System. Creates survey solution for the company's web sites users to monitor the productivity and responsiveness of their employees by assigning different surveys to their customers</li> <li>▪ Revamping of web sites. Responsible for designing and maintaining different web sites and their applications to support the Sales, Marketing and Portal systems of the company</li> <li>▪ Compliance, Licensing and Registration. Internal Human Resources applications to manage the certifications and status for the company's employees; as well as monitoring of office and employee licenses, renewals and surety bond coverage based on individual state requirements</li> </ul> </li> </ul>

<b>Date</b>	January 2012 – November 2013
<b>Company</b>	Infinity Home Mortgage Company, Inc. Cherry Hill, NJ
<b>Title</b>	Ellie Mae Encompass® 360 Administrator/MLO
<b>Job Description</b>	<p>Originated and verified residential/commercial loans; ensuring that they met standard lending guidelines, and that proper disclosures were in compliance with current state laws. Prepared and submitted 1003, 1008, and all other necessary documents for different underwriters and investors. Calculated LTV and Debt ratios and escrows and prepare proposals for customers in the Conforming and non-conforming markets, as well as FHA/VA government programs.</p> <p>Responsible for preparing and submitting the company's annual HMDA Report</p>

	for 2012 to HUD.
<b>Date</b>	October 2008 – December 2011
<b>Company</b>	DPT Business School Philadelphia, PA
<b>Title</b>	IT/ESL Training Specialist
<b>Job Description</b>	<ul style="list-style-type: none"> <li>○ Planned, prepared and delivered lessons and workshops for groups and individuals</li> <li>○ Developed and facilitated professional training and development, learning initiatives, and training recommendations for specific disciplines</li> <li>○ Developed guiding principles and strategic direction for internal and external education that met professional, business and client service needs</li> <li>○ Provided reporting to management on web-based training progression and completion, student usage, and instructor-led training completions</li> <li>○ Provided technical support for the organization or educational institution</li> <li>○ Conducted comprehensive needs assessments and determines subsequent training and development priorities</li> <li>○ Provided consultation to management for development of job-specific training, including research and evaluation</li> <li>○ Developed training resources by preparing notes and visual displays in coordination with training needs and specific departmental needs</li> <li>○ Oversaw Training Material meet Compliance with specific requirements</li> </ul>
<b>Date</b>	March 2003 – April 2005
<b>Company</b>	American Business Financial Services (Upland Mortgage) Philadelphia, PA
<b>Title</b>	Director of Training
<b>Job Description</b>	<p>Provided Training for Account Executives, Loan Officers, Loan Processors, Account Managers, Underwriters, Closers, Funders, and Post Closers, in utilizing companywide systems, and in following compliance for each branch accordingly to each State's Laws.</p> <p>Provided on-site training for the all employees. Responsible for ensuring that a consistent approach was presented through all of the training materials, developed comprehensive training classes based on best practices, Acted as the company's system administrator and on-line roles assignor.</p>
<b>Date</b>	January 2000 – December 2001
<b>Company</b>	First Union Warminster, PA
<b>Title</b>	Financial Specialist II
<b>Job Description</b>	<p>Managed an array of banking, lending and investment transactions, maintained Client relationships, and referred bank products, allowing customers to be serviced by different partners in Retail Investment, Private Banking, Online Banking, Retirement and Estate Planning, Business Banking, Cash and Wealth Management, Credit Cards Division, Mortgage and Merchant Divisions, and directly profiled clients for Brokerage and Investments in Mutual Funds, Fixed and Variable Annuities. Licensed in Series 6 &amp; 63.</p>
<b>Date</b>	May 1998 – December 1999
<b>Company</b>	PNC Bank Warrington, PA
<b>Title</b>	Personal Banking Supervisor II
<b>Job Description</b>	<p>Organized and participated in several seminars focusing on customer relations, such as, Retirement, College Funding, and credit management; while at the branch, specialized in Mortgages and Home Equity Loans/Lines for Consumer and Commercial customers, having a consistently renewed pipeline of loans which surpass proposed goals.</p>
<b>Date</b>	August 1997 – May 1998

<b>Company</b>	Jefferson Bank Philadelphia, PA
<b>Title</b>	Customer Service Representative
<b>Job Description</b>	Contributed to the success of a new branch opening, which catered to Spanish speaking customers, while serving customers with a complete array of banking products Such as, checking, saving, money market and IRA accounts, CD's and credit cards.

<b>Date</b>	September 1986 – June 1997
<b>Company</b>	Grupo Hispano Mexicano Mexico City, Queretaro, Puebla, Toluca, Acapulco, Mexico
<b>Title</b>	Language Coordinator/ Vice Principal
<b>Job Description</b>	<ul style="list-style-type: none"> <li>○ Adhered to and enforced board policy, school guidelines, administrative directives, the Master Contract, and district standards</li> <li>○ Assisted in the development and administration of policies dealing with discipline, conduct, and attendance</li> <li>○ Communicated relevant policies and procedures with regard to student discipline, conduct, and attendance to students, staff, and parents</li> <li>○ Worked with and assisted faculty in the development of effective classroom discipline and organization</li> <li>○ Maintained an effective and safe school environment</li> <li>○ Assisted Building Principal with fire, storm and tornado drills on a regular basis and is able to implement emergency evacuations and lock-downs effectively</li> <li>○ Assisted in curriculum development to meet the needs of all students</li> <li>○ Assisted in the selection and mentoring of staff</li> <li>○ Supervised and evaluated certified and paraprofessional as assigned</li> <li>○ Organized and supervised special events</li> <li>○ Performed other duties as assigned by the Building Principal or District Administrator</li> </ul>

## EDUCATION

<b>BS Science of Education</b>	1991 - 1996	Liceo Iberomexicano (affiliated to the Anglo-Mexican Institute and the British Council)
<b>Certification in TESOL</b>	1994 - 1996	Trinity College London
<b>Certification in ESL</b>	1994 - 1995	Cambridge University

## ADDITIONAL TRAINING

<b>Ellie Mae Encompass® 360 Experience</b>	October 2012	5 Days
<b>ETO Software Training and Implementation</b>	September 2010	3 Days
<b>Workshop/Seminar on BTOP</b>	August 2010	5 Days
<b>Development Of Web Applications Using ASP.NET With C#</b>	November 2007	
<b>Basic .NET Development Training</b>	April 2003	2 Days
<b>Microsoft Tech-Ed 2002</b>	April 2002	5 Days
<b>Exchanging and Transforming Data Using XML and XSLT</b>	April 2002	2 ½ Days
<b>Building XML-Based Web Applications</b>	April 2002	2 ½ Days
<b>C++ For Non C Programmers</b>	August 2001	5 Days
<b>Programming Microsoft SQL Server 2000 Database</b>	April 2001	5 Days
<b>COM/DCOM/Active X Components with Visual Basic</b>	April 2001	3 Days
<b>Introduction to XML</b>	January 2001	3 Days
<b>Implementing Site Server 3.0</b>	July 2000	3 Days
<b>Building e-Commerce Applications with Site Server</b>	July 2000	2 Days
<b>Vignette Story Server v5</b>	July 2000	5 Days

## NOTES

US Citizen  
Will require 3 weeks' notice