

# BARBARA MONTALVO

## LEGISLATIVE LIAISON



### OBJECTIVE

Passionate seasoned administrative and managerial professional, seeking to share my skills and experience with the next generation.

### EXPERIENCE

2013 - Present  
City of New Haven, CT

- **Legislative Liaison to the Board of Alders** [2022 – present]  
Office of Mayor Justin Elicker
  - Day-to-day operations of assigned lobbying activities
  - Testifies, advocates, and negotiates legislative and regulatory proposals with the Board of Alders
  - Legislative writing, processing, and research
  - Management of relationships between the executive and legislative branches, including lobbying and meetings between municipal legislators and city administration
  - Constituent services, outreach and communications
  - Record management, constituent education and screening for municipal boards and commissions
- **Treasury Analyst**, [2016 – 2022]  
Treasury Office, Finance Department
  - Daily bank reporting, reconciliation, deposit preparation, ACH and Wire processing
  - Special projects such as credit card system setup requests
  - Public Debt issuance (public market & private placement), maintenance and disclosure compliance
  - Funding for accounts payable and payroll management, vendor EFT program
  - State and federal grant payment processing
  - Cash management for general and special funds
- **Administrative Records Coordinator**, [2013 – 2016]  
Office of Legislative Services
  - Constituent services and support
  - General office management & departmental scheduling
  - Special event planning and logistics as needed (with special attention to 3 large annual recurring events)
  - Executive administrative assistant to Director of department
  - Interdepartmental liaison

### EDUCATION

**Western International University**

Chandler, AZ

*Masters of Business Administration: Management*

*Minor: Leadership*

**Manhattanville College**

Purchase, NY

*Bachelor of Arts: History*

*Minor: Asian Studies*

### KEY SKILLS

- BUSINESS ADMINISTRATION
- PUBLIC ADMINISTRATION
- MUNICIPAL GOVERNMENT
- BANKING AND FINANCE
- CONFLICT MANAGEMENT
- LEGISLATION
- LABOR RELATIONS
- CUSTOMER SERVICE
- RESEARCH
- BUSINESS COMMUNICATIONS
- COMMUNITY LIAISON

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2007 - 2013

Wells Fargo, NA

**Collateral Analyst I, Collateral Monitoring Department, Corporate Finance**

- Maintained a portfolio of 40+ accounts for midsize business revolving lines of credit based on asset-backed lending.
- Reviewed per loan documents on file each account's submitted financial filings to recalculate the revolving line of credit against their financials as far as which assets were eligible to be lent on and which were considered ineligible.
- Internal customer relationships with various bank loan officers, vice presidents, to ensure all loan documents were submitted within the required loan timelines for processing.
- Office Information Technology contact for official updates and backup files

**Fraud Prevention Specialist II, Business Direct, Small Business Lending**

- Call center support for small business lending applications (lines of credit and credit cards)
- Research and review of business filings for small business credit applications in conjunction with underwriters' reviews.

**Financial Crimes Specialist II, Debit Card & ATM Operations**

- Call center support for retail banking customers to investigate and process debit card claims (fraudulent and merchant dispute claims) through the Visa chargeback process.
- Claim processing including and not limited to ordering of photocopies of charge slips, processing stipulation letters and provisional or final credits to retail bank customer accounts.

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**COMMUNICATION**

Language Skills: Native English proficiency; Spanish limited working proficiency

WPM: 70 wpm

Software Skills: Microsoft Office suite, Legistar, MUNIS

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**REFERENCES**

Available upon request.

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**LEADERSHIP**

- **Vice President**, AFSCME Local 3144 [2019 – 2022]
- **District 2 Representative**, AFSCME Local 3144 [2017 – 2019]
- **Member**, Prospanica, the Association of Hispanic Professionals [formerly National Society of Hispanic MBAs] [2011 – current]
- **Member**, Government Finance Officers Association (GFOA) [2016-2022]
- **Member**, Connecticut Government Finance Officers Association (CT GFOA) [2018-2022]