

# Carolina M. Rodriguez

## PRIVATE FIDUCIARY

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P.O. Box 5193, Fullerton, CA 92838 | (562) 578-9336 | carosjade@jadefms.net

### SKILLS

Private Professional Fiduciary with over 20+ years of banking and fiduciary advisory specialist experience. 18+ years of Special Needs Trusts administration, including probate, accounting, conservatorship & guardianship administration. Extensive knowledge of Social Security rules and guidelines. Diverse banking experience for all clients.

### EXPERIENCE

#### **Jade Fiduciary Management Services - Fullerton, CA**

She-EO - Licensed Private Professional  
Fiduciary 2025 - Present

- Continue to work with clients in providing them guidance, empathy and problem-solving skills as they navigate through the world of Special Needs Trust.

#### **Wells Fargo Bank, NA - Pasadena, CA**

Senior Special Needs Trust Advisory Specialist - Vice President

AUGUST 2015 - JUNE 2024

- Court ordered first party SNTs, conservatorship & guardianship accounts
- Managed a diverse relationship portfolio of about \$300m in fiduciary accounts
- Fluent bilingual Advisory Specialist that covered relationships within the continental United States, Mexico and Argentina.

### EDUCATION

#### **University of California - Santa Barbara**

Bachelor of Arts - Political Science, with an emphasis in International Relations - Minor in Spanish

AUGUST 1999 - AUGUST 2003

#### **Professional Fiduciary Association of California**

California Code of Regulations Section 4442 - Continuing Education Requirements JAN - FEB 2025

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**National Guardianship Association Professional Fiduciary Association of California**

Guardianship Certification JAN -  
FEB 2025

**Pepperdine University - Cannon Financial Institute - Malibu, CA**

Trust Administration School APR  
2012

**AWARDS**

**2012 Wells Fargo Bank Exceptional Service Award Recipient for Outstanding Customer Service and Integration Skills**