

Carolina M. Rodriguez

PRIVATE FIDUCIARY

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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

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