

Kyle Critcher

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I pride myself on providing the highest level of client service to each client, prioritizing client satisfaction while managing key performance indicators and leveraging emerging technology. I am highly reliable with a proven track record of helping clients achieve objectives by identifying client needs, understanding industry trends, and translating complex situations into actionable strategies.

SKILLS

- **CRM & Account Management:** Customer Relationship Management (CRM), Salesforce, Dynamics CRM, Account Management, Client Onboarding & Implementation
- **Customer Success & Retention:** Customer Success, Account Retention & Growth, Stakeholder Communication, Long-term Relationship Building
- **Operations & Analysis:** Documentation & Process Improvement, Data Analysis & Performance Tracking, Problem-Solving & Conflict Resolution

EXPERIENCE

Multi-contract AI Advanced Data Trainer

Remote • Multiple contract projects specializing in financial models • June 2025 - Present

- Curate and evaluate hypothetical real-world scenario data sets for LLM training in financial strategic reasoning across text.
- Contribute to RLHF and preference-ranking workflows by evaluating model outputs, identifying quality gaps, and documenting edge cases.
- Maintain comprehensive documentation systems with clear and transparent communication to ensure project accuracy, process adherence, and facilitate knowledge transfer for future projects.
- Support bias and safety evaluation tasks by flagging hallucinations, harmful outputs, and improperly prioritized goals.
- Collaborate with cross-functional stakeholders to improve documentation quality, tooling workflows, process improvement initiatives, and QA evaluation standards.

Financial Advisor

LPL Financial, Fort Mill, SC • Aug 2022 - Aug 2024

- Developed comprehensive financial plans and provided investment advice to clients, maintaining >98% client retention rate.
- Achieved \$2M AUM conversion rate per quarter through holistic retirement planning utilizing diverse investment vehicles (equities, fixed income, alternative products,).
- Assisted clients with budgeting and debt reduction strategies to achieve long-term financial objectives.
- Maintained strong client relationships through proactive communication and periodic portfolio reviews to ensure long-term financial success.

Financial Advisor

Vanguard, Charlotte, NC • Apr 2022 - Aug 2022

- Serviced client needs and connected them with Senior advisors to position comprehensive financial advice solutions.
- Assisted with inbound call flow to generate appointments and maintain business operations.
- Provided operational support to other advisors in both client servicing and financial guidance.
- Monitored and evaluated investment performance within the existing client base to identify optimization opportunities.

Registered Representative

Western & Southern Life, Charlotte, NC • Feb 2021 - Apr 2022

- Positioned financial and risk reduction strategies through mutual funds and insurance products tailored to client needs.
- Developed and implemented sales strategies that increased policyholder retention rates and drove revenue growth.
- Performed risk assessments and assisted in underwriting processes to evaluate applicant insurability and determine appropriate coverage levels.
- Leveraged relationship-building into referral opportunities to create additional sales channels and expand client base.

Sales Consultant

Carolina Premium Beverage, Charlotte, NC • Jan 2017 - Feb 2021

- Developed and implemented sales strategies to increase market share across assigned territory (Charlotte, Belmont, Mount Holly, Gastonia).
- Provided exceptional customer care while executing sales objectives and corporate marketing support initiatives.
- Implemented growth strategies driving consistent revenue expansion and sustainable business results.
- Leveraged exceptional service into upselling opportunities, earning additional product displays and preferred store positioning.

EDUCATION

University of North Carolina at Charlotte

Bachelor of Science in Business Marketing • June 2016 • Minor: Film Studies (Writing Focus)

LICENSES & CERTIFICATIONS

- Series 7 (General Securities Representative) • Inactive
- Series 66 (Uniform Combined State Law Examination) • Inactive
- Life & Health Insurance License • Inactive
- Anthropic Academy (Claude API, Agentic AI, Propt Eng)

- Google AI Essentials

AWARDS

- 2019 Convenience Store Salesman of the Year • Carolina Premium Beverage