MAKENA JAMES, MM

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PROFESSIONAL SUMMARY

Client-focused professional pursuing a career in financial services, backed by a FINRA SIE license and hands-on experience in financial management, sales, and cash handling. Skilled at building relationships, qualifying leads, and managing budgets, taxes, and assets with a track record of zero outstanding debt beyond 30 days. Currently completing a financial planning credential at the University of Georgia.

LICENSES & EDUCATION

Securities Industry Essentials (SIE) — FINRA | Passed June 30, 2026
University of Georgia — Education Credential in Financial Planning, 2026–Present
University of Southern California — Master of Music in Organ Performance, GPA 3.9, 2023–2025

CORE COMPETENCIES

Client Relationship Management • Sales & Lead Qualification • Financial & Budget Management • Cash Handling • eMoney Planning Software • Program Curation & Scheduling

PROFESSIONAL EXPERIENCE

Owner & Business/Financial Manager | *Northstar Productions* June 2022 – Present

- Manage full-cycle bookkeeping, tax filings, and asset management for an independent business, maintaining zero outstanding debt beyond 30 days.
- Coordinate with venues and clients to structure musical projects, negotiating contracts and hiring guest musicians.

Party Sales Representative | *Creative Parties for Kids, Orange, CA* March 2026 – Present

- Consult with clients to sell customized party packages, qualifying needs and closing sales to fit budget and preferences.
- Draft custom booking contracts and manage scheduling for each client engagement.

Music Ministry Coordinator & Organist | *Tustin Presbyterian Church, Tustin, CA* July 2025 – Present

- Oversee administrative, operational, and scheduling functions for a large, multi-faceted department under fast-paced conditions.
- Build relationships with congregation members and stakeholders, incorporating feedback into program planning.

Carhop & Cash Handler | *Sonic Drive-In, Asheville, NC* June 2022 – August 2022

- Processed and reconciled cash payments and tips while delivering high-volume, accurate customer service.

ADDITIONAL EXPERIENCE

Music Ministry Coordinator & Organist | *Manhattan Beach Community Church, Manhattan Beach, CA* Sep 2023 – Mar 2025
Event Usher & Floor Manager | *Trojan Event Services, Los Angeles, CA* Sep 2023 – Jul 2024, Jan – May 2025
Music Ministry Coordinator & Carillonneur | *First Congregational Church, Riverside, CA* Apr – Jun 2025
Music Ministry Coordinator & Organist | *Fairfield Mountains Chapel* Feb – Nov 2022
Cashier | *Big Lots / Harris Teeter, Asheville, NC* 2016 & 2020