

Stefanie Ambrosio Pontlitz
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EDUCATION: Bachelor of Communications, May 2003

Minors: Business and English

Florida State University, Tallahassee, FL

Graduated Cum Laude

Series 7 & 66 Licensed

EXPERIENCE:

Chief Operating Officer, May 2025 to Present

Pontlitz Asset Advisors, New Port Richey, FL

- Direct daily operations across all departments to ensure seamless delivery of financial advisory services and client satisfaction.
- Collaborate with the Chief Wealth Strategist to develop and execute business strategies aligned with firm growth and client retention goals.
- Oversee compliance with SEC, FINRA, and state regulatory requirements, ensuring firm policies and procedures adhered to industry standards.
- Streamline operational processes, implemented scalable systems, and drove efficiencies to support growth and profitability.
- Manage financial forecasting, budgeting, and resource allocation
- Supervise cross-functional teams including client services, marketing, finance, and HR to enhance operational alignment and team performance.
- Identify and deploy new technologies and platforms to improve advisor productivity and client experience.
- Build and maintained vendor and partner relationships to support firm operations and business development initiatives.
- Develop KPIs and dashboards to track operational performance and support data-driven decision-making.
- Oversee risk management protocols and business continuity planning.

Chief Executive Officer, Executive Director, November 2020 to May 2025

Lighthouse for the Visually Impaired and Blind, New Port Richey, FL

Fiscal Control:

- Analyze and direct all financial operations of all programs and services
- Work closely with the contracted accounting firm to maintain standards of accounting applicable to non-profit business practice
- Negotiate contracts and agreements with funding sources in accordance with the guidance of the Board of Directors

Programs:

- Establish program objectives, and ensure objectives are achieved
- Carry out programs that meet national accreditation standards and achieve the objectives of each program
- Oversee and supervise all rehabilitation programs, including holding regular staff and case management meetings, policy and procedure reviews, curriculum development and staff development/training
- Locate new sources of funding and oversee grant proposals & applications

Personnel Management:

- Carry out sound personnel practices and policies in accordance with the Personnel Manual and current professional standards
- Recruit, employ, supervise, evaluate, and discharge all personnel
- Encourage professional growth of staff

Policy:

- Helps set and carry out the policies and procedures as set forth in the Policy & Procedure Manual
- Recommend changes in policies and procedures
- Presents recommendations to the Board of Directors concerning legal and contractual obligations of the agency

Community Relations:

- Initiate new contacts and maintain contacts with other human service agencies, and network locally, statewide, nationally, and internationally
- Promote awareness about blindness and low vision within agencies, businesses, and organizations in the community

Fundraising & Development:

- Serve in concert with the Board of Directors in fundraising

Owner, March 2021 to Present

Cypress Charitable Consulting

Grant Writing:

- Offer ongoing contracts for grant writing services for nonprofit organizations
- Research grant opportunities, write highly competitive proposals and participate in debriefs on approved or rejected proposals

Social Media:

- Offer on-going contracts for social media services for nonprofit organizations
- Work with organizations for content and create additional content
- Track and analyze results based on social media platforms

Vice President Development, March 2018 to November 2020

Youth and Family Alternatives, New Port Richey, FL

- Responsible for planning, directing and increasing the development of financial resources for the organization
- Identify, cultivate and foster new partnerships to expand programming enrichments
- Manage, support and oversee RAP River Run Committee, largest fundraiser
- Work directly with Supportive Living Coaches and Developmentally Delayed residents in new affordable housing project
- Elevate fundraising initiatives and provide management support to overall agency
- Secured \$250,000 in 2019 State Legislative Budget for shelter renovations, \$500,000 requested in 2020 LBR, decision pending.
- In first 6 months of fiscal year 2019-20, wrote grants for a total of \$1,553,000. Decisions pending.
- Produced promotional social media post in cooperation with Pasco County Sheriff's Office, generated 31,000 views, 10,000 likes and more than 1,000 shares
- Wrote, submitted and managed grants through DJJ, DCF and DV
- Raised 1,800,000 in first year and 2,600,000 in second year of position

Chief Operating Officer, November 2016 to March 2018

Vice President of Development, January 2015 to November 2016 (Promoted to COO) Director of Development, April 2012 to January 2015 (Promoted to VP of Development) United Way of Pasco County, Land O'Lakes, FL

- Responsible for planning, directing and increasing the development of financial resources for the organization
- Responsible for development and implementation of annual budget
- Provide timely financial reporting to Finance Committee and Board of Directors
- Annually supervise and mentor Publix Associate on Loan
- Develop, implement and supervise new Small Business Partnership Manager and overall initiative
- Create, implement and execute signature fundraiser, Lip Sync Battle Pasco

- Assist community partners with volunteerism needs, fundraising guidance, and community education
- Compose and distribute the United Way story through press releases, social media, newsletters, and other outlets
- Verify incoming funds for input into donor relations software
- Confirm input of pledges and funds in donor relations software and transfer to QuickBooks
- Utilize monthly Profit and Loss, Accounts Receivable and other fiscal statements to evaluate current fundraising status and pledge loss estimates
- From 2013-2015: Recruit volunteers and leaders to staff locations for annual Stuff the Bus program, schedule volunteers and ensure adequate volunteer coverage throughout event
- Raised more than \$100,000 in school supplies for more than 3,500 Pasco teachers during 3-year Stuff the Bus event
- Increased largest corporate donor campaign in 2016-2017 by 14.05% or \$120,000

Retirement Services Team Lead, February 2010 to April 2012

Customer Service Rep I, August 2009 to February 2010 (Promoted to Team Lead) Chase Investment Services Corporation/Chase Bank, Tampa, FL

- Provide direct supervision to 10+ Customer Service Representatives (CSR) and management support to 30+ representatives
- Evaluate, maintain and deliver monthly reviews to CSR levels 1 through 3
- Assist upper management with all aspects of managing employee performance, quality control and handling escalation requests
- Address high priority/complex requests from internal/external clients
- Develop, implement and supervise a new Retirement Specialist queue available to Financial Advisors and licensed Personal Bankers
- Coach Chase bankers, financial advisors, tellers and private wealth managers regarding policies, procedures, products, systems and banking transactions involved with Retirement services
- Interview candidates for available positions within the Contact Center

Financial Advisor, July 2005 to August 2009

A.G. Edwards & Sons/Wachovia Securities/Wells Fargo Advisors, Port Richey, FL

- Responsible for over \$25 million in client assets
- Maintain and service over 100 households
- Assist in the comprehensive understanding of complex financial issues
- Conduct in-depth reviews of clients' financial circumstances, risk levels, time horizon and goals
- Review and respond to clients changing needs and financial circumstances
- Develop Planned Giving strategies/charitable giving strategies as part of client's financial plan
- Obtain and build client base through prospecting
- Provide expert guidance for individuals and businesses in the areas of retirement solutions, insurance and investment services, estate needs, business solutions, education funding, and employee benefits
- Utilize research and product knowledge to maintain assets according to clients' goals
- Achieved Accredited Asset Management Specialist Designation

PROFESSIONAL AND COMMUNITY ACTIVITIES:

- Community resume available upon request

PROFESSIONAL REFERENCES:

- References available upon request