

Kit Muller

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EXPERIENCE

08/2020 – present

HAND, FAY AND CROOKS

Phoenix, AZ

Banking

- Assist clients by providing product consultation and instructions on how to utilize particular features
- Using online knowledge help systems to conduct research and answer questions
- Attending ongoing training to achieve the level of skill needed to solve more complex problems with our constantly improved and ever evolving technology
- Building valuable relationships with clients to maintain a high-level of client satisfaction, resulting in client retention and referrals
- Intermediate proficiency with PC/Windows related software (MS Office suite)
- Experience with solid verbal and written communication skills
- Premier core knowledge experience
- Collaborated with all levels associates and managers for both internal and external customers

07/2017 – 04/2020

WINTHEISER INC

Phoenix, AZ

Banking

- Detail oriented and strong organizational skills with the appreciation for follow through
- Proficiency with Excel and Microsoft programs
- Strong research and resolution skills
- Complete all bank reconciliations and clear off any balancing items
- Prepare and deliver daily deposits to the bank
- Manage general trust and petty cash accounts
- Manage pre-approved payment (automatic withdrawal) processes
- Issue cheques for Licensed Insolvency Trustee draws, dividends to creditors
- Review and process all invoices/accounts payable for the office
- Process payment of court/filing fees, documents related to closure of estates
- Complete creditor mailings and inquiries
- Issue annual proposal payment statements
- Prepare interim and final Statements of Receipts and Disbursements

EDUCATION

OREGON STATE UNIVERSITY

Bachelor's in Finance

SKILLS

- Basic knowledge of organization, business practices, business philosophy, and ethics
- Establish a relationship of trust with clients, in concert with the Private Banker
- Preliminary analysis, compilation, verification and indexation of the financial information and tax structures required to process customer financing requests, in accordance with standards established by the credit center
- Completed three-year college diploma or academic equivalent, related to industry and three years of relevant experience
- Ensure customer satisfaction and loyalty by developing a personalized relationship that meets the needs of each client in the highest standard
- Open commercial, personal, credit files and perform various transactions on behalf of clients
- Proactively handle client inquiries and questions regarding banking, credit and commercial services