

JESSICA CLAIRE

Montgomery Street, San Francisco, CA 94105
(555) 432-1000 - resumesample@example.com

PROFESSIONAL SUMMARY

Highly qualified and accomplished financial professional offering 7+ years of experience in leadership and direction in the financial services and financial products industries. Robust background with loan Funding, servicing, asset management, and loss mitigation strategies. Excel in professional staff training, development, mentoring, and production. Goal-focused Mortgage Executive with commitment to bottom-line success through effective sales development, brand awareness, and client satisfaction.

SKILLS

- Managing a pipeline of over 50 loans
- Outstanding knowledge of all applicable government lending regulations related to real estate and property
- Extensive knowledge of teamwork concepts, customer service and sales techniques
- Ability to accurately analyze, review and understand complex financial data
- Client relationship management
- Written verbal communication Increased revenue, sales growth recruitment and training
- Profound knowledge of mortgage processing, underwriting, and closing practices
- Strong ability to provide high quality customer service diligently
- Deep knowledge of bankruptcy processes

WEBSITES, PORTFOLIOS, PROFILES

WORK HISTORY

- 2013 to Current **Sr. Mortgage Banking Executive**
New Mexico Educators Federal Credit Union – Los Lunas, NM
 - Identified prospects and solicited business referrals, by contacting realtors, attorneys and financial professionals in an assigned territory.
 - Drove company expansion from 12-member mortgage brokerage with one office, to three and established new branch in Las Vegas, NV.
 - Led teams to excel in high-stakes environment while encouraging professional development and independent decision-making.
 - Obtained and maintained information about available loan products, processing procedures, underwriting guidelines and general departmental directives. Assisted with collection of loan-application related documents and delivery of loan package, on a timely basis.
 - Promoted from Sr. Loan Officer to Executive Team Leader within six months of employment.
 - Awarded most revenue per loan award averaging over \$6,300.00 in Net Revenue per funded loan.
 - Awarded highest average loan amount for 2013 \$290,000.
 - Averaged 10 fundings per month and responsible for over \$600,000 in Total Gross Revenue to the company for 2013.
 - Created and Launched The Claire Group inside of Global Equity Finance along with effective marketing for my team.
- 11/2011 to 2013 **Sr. Mortgage Banker & Financial Advisor**
M&T Bank – Ridgefield, NJ
 - Designed financial plans for over 100 high net-worth individuals and business owners including mortgages, insurance, retirement.
 - Managed a team of ten Senior Loan Consultants forging new client relationships and servicing existing ones while maintaining large client base.
 - \$25 million in new loan production, 84 total new loans in 2012, 50% increase from 2011.
 - Increased loan production as a team manager including 30% increase in loan production for entire team.
- 2007 to 11/2011 **Sr. Investment Advisor**
Clary Asset Management LLC – City, STATE
 - Demonstrated record of success in Capital Raising via Private Placement for Preferred and Common stock offering to accredited investors through my own prospecting.
 - Successfully introduced over \$3,000,000 million dollars in one year for an early stage startup company for acquisition purposes, as well as opened two satellite offices in Texas and Ohio.
 - Responsible for managing over \$20,000,000 million in AUM and the succession of several RIA firms throughout the United States under our platform as well as Fixed Income Investments.
- 2007 to 2008 **Financial Advisor**
Axa Advisors LLC – STATE
 - Responsible for helping individuals and business owners design and implement an appropriate investment strategy based on their specific personal financial goals and circumstances.
 - Rendered exceptionally high quality service to clients in the area of estate planning for high net worth individuals using appropriate life insurance policies.
 - Implemented many of my own insurance and securities marketing campaigns.
 - Responsible for establishing new client accounts. Analyzing client's current and future financial needs.

ACCOMPLISHMENTS

- Promoted from Sr. Loan Officer to Executive Team Leader within six months of employment.
- Awarded most revenue per loan averaging over \$6,300 in revenue per funded loan.
- President's Club Achievement.
- Multi-Award Production Levels.

AFFILIATIONS

- Member, Mortgage Bankers Association
- Member, National Association of Mortgage Brokers (NAMB)
- Member MBA's National Technology in Mortgage Banking Conference
- Member of University of Massachusetts Alumni Association.

CERTIFICATIONS

NMLS ID: 528972

- California - DOC Mortgage Loan Originator License
- Minnesota Mortgage Loan Originator License
- Nevada Mortgage Loan Originator License
- New Mexico Mortgage Loan Originator License
- Oregon Mortgage Loan Originator License
- Washington Mortgage Loan Originator License