

# Jessica Claire

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## SUMMARY

Dedicated and organized financial professional with outstanding relationship-building and problem-solving skills. Driven to exceed expectations and operate effectively in fast-paced, high-pressure environments. Self-motivated team player adept at cultivating partnerships and building lasting relationships across all demographics and management levels. Dynamic and reliable with exceptional customer service and communication skills.

## SKILLS

- Fraud assessment
- Analytical
- Team management
- MS Office
- Customer satisfaction
- CRM Certifications
- Client relationship management
- Cost and budget analysis
- Risk analysis
- Project Management

## CERTIFICATIONS

**Series 6** - Entitling me to register as a company's representative and sell certain types of mutual funds, variable annuities, and insurance.  
**Series 63** - Entitling me to solicit orders for any type of security in most states.

## EXPERIENCE

**ASSOCIATE, CLIENT INTEGRATION ANALYST** 08/2022 to CURRENT

**Ascension Health | Broken Arrow, OK**

- Supports the Vice President in the effective implementation, maintenance and administration of first line of defense (1st LOD) programs (e.g., operational risk, internal controls, compliance, regulatory, etc.).
- Facilitates documentation of existing internal processes, including the identification of business risks and controls.
- Participates in initiatives to improve internal processes in regards to data and recordkeeping policies.
- Help manage a book of \$4.5B in assets.

**MANAGER, LICENSED RELATIONSHIP BANKER** 07/2021 to 08/2022

**Boys & Girls Clubs Of St. Lucie County | Fort Pierce, FL**

- Conducted team meetings as well as coached bankers and associates.
- Managed overrides, scheduling, account opening compliance review, P&L Reviews, and daily operations.
- Managing assigned customers and proactively meeting with them - in person and over the phone - to build lasting relationships, discover financial needs, and tailor product and service recommendations.
- Making lives of customers easier by sharing and setting up self-service options to access their accounts.
- Partnering with Specialists (Financial Advisors, Mortgage Bankers, and Business Relationship Managers) to connect customers to experts who can help them with specialized financial needs.

**RISK MANAGEMENT SPECIALIST** 08/2020 to 07/2021

**Accor Hotels | Santa Monica, CA**

- I utilize internal and third party web tools to execute dispute claim investigations in accordance with Federal Regulations E and Z, NACHA Operating Rules, and other applicable regulations.
- File chargebacks and fraud reporting in accordance with payment network (Visa, MasterCard) rules, review merchant responses and determine if they met compelling evidence thresholds; execute arbitrations when necessary.
- Communicate claim investigation findings to members, and credit their accounts when we determine an error occurred.
- Respond to document requests and rebuttals, and communicate findings to members.
- Collect and review documentation from Chime members and third parties.
- Support internal and external audits and due diligence requests.

**FOUNDER/COACH** 05/2018 to CURRENT

**MBA And Associates | City, STATE**

- Regularly work with over 80 players a week.
- Coordinated for 3 other coaches and create schedules and programs seasonally.
- Aided in developing athletes at all levels from beginner to elite.
- Acted as a role model for players by exhibiting positive behaviors.
- Motivated athletes to always be improving in all aspects of their lives.
- Inventoried equipment and kept adequate gear and equipment available for practices and events.
- Consistently integrated new clients to capitalize on business opportunities to increase the overall client base by offering custom to the individual packages.

**ACCOUNTING ASSISTANT** 08/2019 to 01/2020

**Park Ridge Park District | City, STATE**

- Balanced reports and batch summaries to submit for approval.
- Prepared financial statements and prepared journal entries.
- Process accounts payable forms, invoices, and checks, and perform various other bookkeeping functions.
- Gained knowledge in reading legal contractual agreements.
- Planning, controlling, budgeting and decision-making.
- Kept an accurate accounting of cash, credit transactions, and check payments.

**FACILITIES SUPERVISOR** 06/2014 to 03/2020

**Company Name | City, State**

- Maintained the ice, schedule, cooling and mechanical equipment.
- Established and enforced clear safety policies to protect workers from injury.
- Offered input during the planning of special building events.
- Performed weekly maintenance assessments.
- Monitored employee work levels and optimized performance with strategic approaches.
- Assigned tasks to team members based on individual strengths and promoted a teamwork-driven environment to meet goals.
- Suggested changes in equipment use and layout to improve efficiency.
- Evaluated customer issues and complaints and developed amicable solutions.

## EDUCATION

**Bachelor of Science | Business Administration And Management** 06/2020

**DePaul University (Driehaus College of Business), Chicago, IL**

- Dean's List Honoree.
- Coursework in business ethics, career management skills, creativity and entrepreneurship, sales, effective business communication, social media marketing, global economics, contractual agreements, and accounting and finance.
- Senior year focused on investment theory, money and banking, quantitative reasoning, and risk management.

**Associate of Science | Business Economics** 06/2017

**William Rainey Harper College, Palatine, IL**