

# Jessica Claire

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## SUMMARY

Resourceful individual willing to provide the attention and education customers need to ensure a positive financial experience. Relationship Manager knowledgeable in explaining tools clients need to build wealth management portfolios. Understanding that each client that walks in the financial center is there for help. I am patient and kind. I am willing to work hard to satisfy even the most complicated request from clients. I am sufficient with meeting deadlines and i always get my job done with no risk and by the book. I am very versatile and adaptive.

## SKILLS

- Value Selling
- Solution Management
- Relationship Review Process
- Issue Resolution
- Customer Education and Consulting
- Requirements Determination
- Product Recommendations
- Referral Screening
- New Business Development
- Customer Service
- Effective Customer Communication
- Account Management
- Service Assistance
- Portfolio Growth
- Relationship Building
- Excellent Communication
- Overcoming Objections
- Customer Relationships
- Client Acquisition
- Sales Reporting
- Time Management
- Critical Thinking
- Wealth Management Portfolios
- Financial Statement Review
- Performance Evaluation and Monitoring
- Management Team Building
- Team Leadership
- Operational Reporting
- Operations Oversight
- Creative and Innovative
- Goal Setting
- Sales Support
- Service Oriented
- Cost Reduction
- Focus and Follow-Through
- Willing to Learn
- Proactive and Focused

## EXPERIENCE

- 05/2021 to Current    **Relationship Manager, Banking Operations**  
**Geisinger – Cumbola, PA**
- Advised customers on bank products, services and financial planning options.
  - Opened, changed and closed customer accounts.
  - Completed thorough and accurate documentation for money movements, deposits or withdrawals.
  - Adhered to bank and legal guidelines for reporting, loan approvals and money handling.
  - Developed culture of success rewarding performance, productivity and sales results.
  - Reduced bank losses by setting successful risk management policies.
  - Improved decision-making by using current data on market conditions and individual financial situations.
  - Developed and maintained relationships with customers and assisted in generating sales opportunities.
  - Created and maintained large client base by meeting needs and delivering exceptional customer service.
  - Explained benefits of various investment options to help customers fulfill personal investment goals.
  - Processed and approved international and domestic wire transfers, cashed checks and posted deposits and withdrawals.
  - Completed month-end and year-end closings, kept records audit-ready and monitored timely recording of accounting transactions.
  - Maintained current and accurate cash balances for all programs, departments and projects.
- 09/2018 to 10/2020    **Patient Access Representative**  
**Southern Maine Medical Center – City, STATE**
- Applied HIPAA privacy and security regulations while handling patient information.
  - Verified demographics and insurance information to register patients in computer system.
  - Organized and maintained records by updating and obtaining both personal and financial information from patients.
  - Obtained necessary signatures for privacy laws and consent for treatment.
  - Assembled registration paperwork and placed identification bands on patient.
  - Applied knowledge of payer requirements and utilized on-line eligibility systems to verify patient coverage and policy limitations.
  - Processed patient responsibility estimate determined by insurance at pre-registration.
  - Updated reference materials with Medicare, Medicaid and third-party payer requirements, guidelines, policies and list of accepted insurance plans.
  - Communicated financial obligations to patients and collected fees at time of service.
  - Submitted fees and claims to insurance companies manually or digitally.
  - Responded to patient concerns and inquiries professionally and efficiently.
  - Called insurance companies and verified patient coverage.
  - Obtained health, financial and religious information from patients at time of admission.
  - Interviewed patients upon entrance to hospital, gathered appropriate information and entered data into electronic system.
  - Educated patients and caregivers in the use of at-home healthcare equipment.
  - Helped patients obtain health care services by setting up referrals.
  - Explained policies, procedures and services to patients.
  - Addressed patients' complaints-head on, investigated concerns and worked with medical staff to devise solutions.
  - Facilitated communication between patients, medical and administrative staff, administrative staff and regulatory agencies.
- 08/2013 to 01/2016    **Office Administrator Coordinator**  
**Davids Tavern – City, STATE**
- Interacted professionally with customers and inside personnel, answering questions and responding to phone and email inquiries.
  - Maintained company accounting records by entering accounts payable, accounts receivable, invoices and expense reimbursements.
  - Replenished office supplies, placing new orders for restocking to maintain inventory.
  - Reviewed documents and obtained additional information to complete accurate paperwork and avoid delays.
  - Processed financial documents, contracts, expense reports and invoices.
  - Automated office operations by managing client correspondence, records, contracts and data communications.
  - Coordinated schedules, administrative functions, quality assurance and process improvements to bolster operational output.
  - Completed benefits paperwork, processed employee incident reports and performed data entry tasks to maximize team productivity.
  - Handled requests-for-information and delegated customer service tasks to appropriate employees.
  - Tracked project performance data to generate reports and keep management informed of important trends.
  - Developed long-term budgets to assess office expenditures and perform inventory management.
  - Liaised with customers, addressed inquiries, handled meeting requests and answer billing questions to provide outstanding customer care.

## EDUCATION AND TRAINING

- 06/2008    **High School Diploma**  
**Newburyport High School - Newburyport, MA**
- Honor Roll Senior Year
  - Student Athlete
  - Over 100 Hours volunteered