

JESSICA CLAIRE

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PROFESSIONAL SUMMARY

Highly ambitious professional with background in Financial Services Procurement and Management. Expertise in market analysis, forecasting and client needs assessments.

SKILLS

account management, Business Development, business operations, CISCO, International Business, logistics, Oracle, purchasing, Sales, spreadsheets, tax law

SKILLS

Strong verbal communication
Client assessment and analysis
Conflict resolution

Proficient level Microsoft Office
Oracle

WORK HISTORY

Personal Banker Safe, 07/2016 - Current

Off The Muck Market – Canastota, NY

- Target and identify affluent clients, analyze their needs, provide financial solutions based on their relationship and refer them to the appropriate business department when required.
- Partner up with Financial advisors, Mortgage consultants and additional team member to develop client acquisition plans.
- Consultation to business owners of banking and credit solutions throughout Wells Fargo tools and services for business owners.
- Assist Wells Fargo international clients providing tailored recommendations suiting their needs.
- Out of office visits and venues to business owners to develop stronger relationships and increase bank profitability.
- Assist management with operational activities: team member's schedules, cash shipments, random vault audits, dual control assignments, approvals, challenging situations with clients, etc.
- Created strategies to develop and expand sales of services to existing customer which resulted in a 24 % increase in annual revenue.
- Advised clients on mortgage, educational and personal loans.
- Maintained friendly and professional customer interactions.

Licensed Service Advisor, 12/2015 - 07/2016

Mayville Engineering Company, Inc. – Wayland, MI

- Meet business goals by proactively reaching out to existing and new clients, cross-sell and increase insurance coverage.
- Review profit metrics, analyze areas of opportunity and develop an action plan for a successful goal achievement.
- Client outreach for retention, insurance review, renewal and leads for new business and high value account management.
- Create policy orders based under the Texas Insurance Law for Homeowners, Renters, Flood (FEMA), Auto and Commercial.
- Partnership with Real Estate agents, Mortgage Consultants for business acquisition and referral program.
- Supported Chief Operating Officer with daily operational functions.

Office Manager, 02/2013 - 12/2015

Arredondo Insurance Group – City, STATE

- Established and developed highly-efficient and dependable administrative team by delivering ongoing coaching and motivation while providing opportunities for career acceleration through achievements.
- Monitored and evaluated personnel performance to complete quarterly reviews, recommend advancement or address productivity concerns.
- Held oversight of office inventory activities, including ordering and requisitions, stocking and shipment receiving.
- Established efficient workflow processes, monitored productivity and implemented modifications to improve overall effectiveness of office personnel and activities.
- Match invoices to statements and purchase orders for optimum accuracy.
- Revision of lawful permits and commercial invoices as result of transnational operations.
- Record payments history, manage the cashbox when needed, deposit of checks or payments when requested.
- Build rapport with the suppliers and manage the logistics process to ensure business operations.
- Administered to CRM and company database, maintenance and updates.

Buyer, 07/2010 - 01/2013

Infosys LTD – City, STATE

- Research of requested product, review supplier's location, price, quality and efficiency for a well rounded decision.
- Negotiate price, term of payments, product specifications, shipment details, warranty policies and further assistance required.
- Quote the inquired products and services and present at least three ideal options for business.
- Place requisition of products into the ERP & MRP

• Discuss budget specifications with management when required and review reduction of costs options.

• Weekly phone conferences with management regarding financial or market updates.

• Facilitated a fast-paced and dynamic entrepreneurial environment.

• Served as executive staff liaison to several committees.

• Reconciled business and creative needs.

• Observed all laws, regulations and other applicable obligations.

EDUCATION

Project Management Certification: Management , 2018 - On going

Houston Community College - Houston, TX

Bachelor: International Business Management , 2012

Universidad Autónoma de Nuevo León - San Nicolás de los Garza, N.L.

- Emphasis in Business development and Management

AFFILIATIONS

Chair member of the Wells Fargo Latin Connection Houston Chapter