

Robert Smith

Financial Services Representative

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SUMMARY

Highly qualified and experience in many fields such as a Lead/Trainer, financial institution, customer service, contact center, retail, restaurant, customer service, and warehouse, seeking an opportunity to work for a company that will allow a long term career relationship.

SKILLS

Trainer, Cash Handling, People Oriented, Outstanding Customer Service.

WORK EXPERIENCE

Financial Services Representative

Fedex Employee Credit Association - February 2015 - 2020

- Provides quality customer service and support to customers on a daily basis, including phone interaction, problem resolution, and account transaction processing in a timely manner.
- Executes all correspondent requisites in a timely and accurate manner with an understanding of the underlying business and specific customer needs.
- Provides product knowledge and technical assistance as necessary.
- Investigates and corrects errors in customer accounts and statements.
- Maintains correspondent accounts in accordance with applicable regulations and policies, ensuring regulatory compliance and minimizing exposure related to assigned processing tasks.
- Enters information to a computerized database.
- Communicates any problems or issues to management.

Financial Services Representative

Delta Corporation - 2014 - 2015

- Sold and serviced new/existing transactional accounts, CDs and IRAs in addition to generating referral sales opportunities.
- Assist customers with banking transactions, open new accounts, cross-sell and balance cash drawer daily.
- Build and maintain customer relationships.
- Skills Used Mathematical, computer and strong communication skills.
- Sold Insurance and Investment products Series 7, 6 and 63 licensed within 90 days scoring highly in all testing.
- Earned Founders Award for Production.
- Verizon Wireless, Financial Services Representative Attempted to collect on past due accounts, assist customers with billing questions; set-up.

EDUCATION

Business - 2010(Southeast CC - Memphis, TN)