

JESSICA CLAIRE

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CAREER FOCUS

Relationship Manager focused on maximizing sales by managing all accounts systematically and logically. Strongly Believes consistency and dedication build the most successful business partnerships.

HIGHLIGHTS

- FINRA Series 6 License
- FINRA Series 63 License
- Bilingual in [\[English and Spanish\]](#)
- [Reliable](#)
- Excellent time management skills
- Inspiring team leader
- Flexible
- Excellent communication skills
- Sales force training
- Effective team player
- Dependable and reliable

PROFESSIONAL EXPERIENCE

02/2015 to Current **Client Associate - The Fries Wealth Management Group**

Bok Financial Corp. – Prairie Village, KS

- Took daily inbound calls and key-entered orders, faxes, backorders and credit memos for assigned accounts and clients.
- Measured loan submissions based on quality control plans and investor regulatory compliance standards.
- Implemented financial planning recommendations.
- Assisted senior-level credit officers with complex loan applications.
- Maintained confidentiality of bank records and client information.

10/2011 to 02/2015 **Relationship Banker**

Colliers International – Silicon Valley, CA

- Managed a book of business containing [15+] accounts.
- Scheduled an average of [3] appointments per day.
- Upsold add-on services to existing customers, generating Growth in balances.
- Completed on average [10+] daily outbound calls generating sales and referrals.
- Addressed customer questions and concerns regarding products, fees, along with terms and conditions.
- Delivered exceptional account service to strengthen customer loyalty.

08/2003 to 11/2011 **Sales Associate**

Best Buy Co – City, STATE

- Addressed customer questions and concerns regarding products, prices and availability.
- Trained sales teams on new technology products at seminars and special events.
- Answered customers' questions about products prices, availability, uses and credit terms.
- Managed [5+] Employees.
- Delivered exceptional account service to strengthen customer loyalty.

EDUCATION

2005 **High School Diploma**
Proviso East High School
Leadership Academy

LANGUAGES

Bilingual Spanish/English Fluent reading/writing Spanish.

SKILLS

Automotive, book, cold calling, Strong interpersonal skills, credit, customer service skills, English, special events, Leadership, communicator, reading, selling, sales, seminars, Spanish, Bilingual Spanish