**David M. Pearce**

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**PROFESSIONAL EXPERIENCE**

**California Tax Relief Associates**

**June 2011- December 2019**

**Floor Supervisor & Sales and Development Coach**

* As a Tax Resolution Analyst, I interviewed and resolved major financial problems for hundreds of tax burdened individuals who needed quick, reliable and professional advice with their tax issues.
* Promoted in June of 2015 from Tax Resolution Analyst to Floor Manager where I lead a crew of 10 analysts in helping resolve and close more indivdual files than ever in the companys 9 year history from August of 2015 to August 2016.
* I lead the companies first sales and service training program for both current and incoming employees. I along with two other outstanding former analysts helped create fresh but consistent company sales processes including script writing, closing techniques, handling objections and proper follow up procedures. This ensured each of our clients experienced the same, high quality service from beginning to end regardless of their financial status.
* Company continued to hit new sales records in both quantity of new clients closed, amount of tax dollars saved, and company net profit each consecutive year until the owner retired unexpectedly in December of 2019 due to personal health concerns.

* \*company no longer in business\*

**Wachovia Bank/Wells Fargo Bank**

**Licensed Premier Banker II**

**Jan 2006- April 2011**

* As a Senior Licensed Banker, my job was to aquire affluent individuals whose net worth was in the range of 500k to 2 million in total assests. These were mainly small business owners, C- level executives and retired individuals. After doing a thorough needs analysis with each individual or business entitity, I would then decide what I felt were the proper financial instruments to put them in according to a variety of factors.
* I was also measured on my ability to cross selling as many other bank services that would benefit them as possible. I used very ambitious and creative sales tactics to garner as much volume business as possible, including offering other bank products to each individual, setting up appointments with my partners at every available opportunity and offering to do financial reviews for friends or family at no cost.
* I led a grass roots program/team tasked with cross selling Wachovia bank products to customers in a variety of ways and was forced to think outside the box because of our unknown presence on the west coast. This included traditional methods such as warm and cold calling, but also more assertive methods such as contacting both personal and business bank customers at their place of business for annual financial reviews, taking advantage of company canvassing and marketing campaigns to lure businesses from other banking institutions..
* When the merger began, I seamlessly merged high net worth Wachovia clients to Wells Fargo accounts while maintaining near perfect marks for our company customer service index during the **largest bank merger in history**

**Blue Lake Police Department**

**Blue Lake, CA Jan 2003- Nov 2005**

**City of Blue Lake, Police Officer**

* Attended one of the states top full time, para-military sheriffs academy's and graduated with honors.
* Promoted to a full-time police officer from reserve within first six months of employment
* Used personal time to become DRE (Drug Recognition Expert) certified and a K9 cover officer.
* Displayed competency above and beyond department requirements for firearms training, defensive tacs, report writing and perishable skills.

\**Left law enforcement due to city department budget problems, resulting in the department being disbanned and being effectively laid off while local sheriff’s department taok over city law enforcement duties.\**

**EDUCATION**

**University of Laverne**  Bachelors of Science

January 2010 - June, 2013 Psychology June, 2013

Series 7, 66 and Health Insurance State of California Expired