

Small Business Specialist

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Objective

To obtain position where I can use the skills that I have acquired through my various work experiences and grow within the organization.

Skills

Microsoft Office, Customer Service, Account Management,.

Work Experience

Small Business Specialist

ABC Corporation - May 2006 - October 2011

- Responsible for knowing the policies and procedures including KYC and AML when opening new accounts.
- Responsible for knowledge of the OFAC policies when dealing with clients.
- Followed CIP requirements and responsible for knowledge of appropriate business identification.
- Wrote enhanced due diligence reports when appropriate.
- Sourcing new business prospects from 0-10mm by cold calling, visiting local business door to door, referrals, creating a network of sources of influence.
- Profiling businesses owners to better offer business solutions such as lines of credit, treasury management services, merchant card processing, payroll, etc Meeting sales goals and reaching a minimum of 125% in at least 3 of 5 business metrics.
- Work closely with specialty business partners that offer a wider range of services that create a longer retention of new clients.

BUSINESS SPECIALIST

ABC Corporation - 2003 - 2006

- Started at Apple in Fort Lauderdale as a full time specialist and became very involved in all aspects of the store.
- Became a Business Support Specialist for The Galleria store and then promoted to Business Specialist in Boca Raton in less then a year.
- My responsibilities were in coaching, training and developing business culture and business leads from all departments of the store.
- This was achieved by training classes, participation in department meetings, feedback and mentoring.
- Was directly responsible for the quality and quantity of business leads in the technical department.
- The percentage of individual contributions of leads had increased by 40% and the amount of leads had increased by 60% YTD.
- (accomplishment based on a designed Action Plan.) Awarded by my peers in store meeting as; "most helpful", "best attitude", "best dressed" and "most likely to succeed.".

Education