

ROBERT SMITH

Financial Business Specialist

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Consistent, hardworking and highly motivated person. Enjoy working with people. Crucial to demonstrate the importance of duties and expectations. Looking to improve position in the work force, expand my knowledge and skills.

2004 - 2005

FINANCIAL BUSINESS SPECIALIST - ABC CORPORATION

- Provided technical support to individuals within the Clerk of Court including assisting with and solving a variety of computer and software related issues.
- Logged, prioritized, escalated and coordinated/assisted internal IT (TSD) department as needed.
- Designed, created, and maintained various forms, documentation, and training material applying to the Case Management Software, internal SharePoint website, and external public website in order to facilitate the needs of the Civil department.
- Created various database queries using Oracle Business Intelligence to assist the Judiciary and the Civil department as necessary.
- Assisted in the evaluation and testing of new software and updates prior to department wide implementation.
- Responsible for managing projects including the coordination, dissemination, training, and follow-up with multiple individuals.
- Ensured success of ongoing projects by actively monitoring deadlines and meeting all necessary goals/expectations.

2000 - 2004

BUSINESS SPECIALIST - LOAN AND TAX FORM DOCUMENT REVIEW

- N.A., Private Bank, Mortgage and Commercial Divisions, and the Corporate & Investment Bank, Westmont & Chicago, IL 2010-Present KYC Associate Sr role includes verifying through third party sources evidence of numerous client variable account record information.
- Reviewed cases according to regulations, firm policies and procedures.
- Expert in writing ownership structures in reviews on annual reports and financial statements, incorporation documents and disclosure forms.
- Ability to multi task and deliver results in a fast paced environment.
- Demonstrated high level of client service to Investment Bank customers utilizing Office, Excel, Word, Adobe, and database management.
- Verified the preparation and execution of Ultra High Net Worth client Collateral Security documents for Onboarding & Servicing, auditing for compliance to proceed with authorization Expert in Tax Forms, 1st & 2nd mortgages, and Commercial loan document.

- Within 1 week on the job in the Private Bank, I trained new hires..

EDUCATION

Bachelor's in Supervision and Management - (Edison State College)

SKILLS

Microsoft office, Type 55wpm, 10 key touch.