

Latisha White

Leasing Specialist (Sales/Marketing/Advertising)

Rancho Cucamonga, CA

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I currently have an active P&C license issued by the state of California. I also have an active life & health license. I've worked in every aspect of banking from personal banker and loan originator to mortgage processor and insurance agent.

Authorized to work in the US for any employer

WORK EXPERIENCE

Agency Producer

Farmers - Encino, CA - December 2014 to Present

Responsibilities

- Approach potential clients by utilizing mailings and phone solicitation; make presentations to groups at company-sponsored gatherings; speak publicly to community groups on the subject of financial well-being.
- Determine clients' particular needs and financial situations by scheduling fact-finding appointments; determine extent of present coverage and investments; ascertain long-term goals.
- Develop a coordinated protection plan by calculating and quoting rates for immediate coverage action and long-term strategy implementation.
- Obtain underwriting approval by completing application for coverage.
- Complete coverage by delivering policy; plan future follow-up visits and evaluations of needs.
- Provide death benefits by delivering policy proceeds; reassess client needs.
- Update job knowledge by participating in educational opportunities; reading professional publications; maintain personal networks; participate in professional organizations.

Leasing Specialist (Sales/Marketing/Advertising)

Waypoint Homes - Palmdale, CA - September 2013 to December 2014

Utilized websites and flyers to advertise homes for lease

- Assisted manager in developing and implementing effective marketing strategies to increase property traffic and internet leads
- Converted phone calls to property tours
- Maintain thorough product knowledge of properties
- Lead property tours for prospective tenants
- Prepared lease documents and related paperwork for management
- Facilitating the move in /move out process

Loan Documentation Specialist IV

Wells Fargo - Minneapolis, MN - August 2011 to September 2013

Processing/Customer Service/Sales)

- Handled document procurement for the flood insurance review of the condominium approval process
- Reviewed insurance certificates against Wells Fargo and agency requirements
- Established relationships with professional management companies, title companies and sales partners to create an efficient and positive condominium insurance review experience for our internal and external customers

- Interpreted policies while analyzing applicant, property and documentation

Loan Documentation Specialist III

Wells Fargo - Minneapolis, MN - August 2010 to August 2011

Customer Service/Sales/Processing)

- Processed loans approved by an Underwriter
- Requested necessary documentation from borrowers needed to clear underwriting conditions
- Verified conditions of approval which includes customer income/assets documentation
- Resolved routine title issues including, but not limited to vesting issues, child support liens, judgment liens, mechanic liens and undisclosed liens
- Maintained a high level of customer service by being proactive in communication with customers
- Took incoming calls and made outbound calls for customers to assist in satisfying conditions needed for loan approval
- Used Automatic Call Distributor (ACD) to answer customer inquiries

Personal Banker

Wells Fargo - Saint Louis Park, MN - July 2009 to August 2010

customer service/sales)

- Performed teller duties (self trained)
- Oversaw the financial activities for personal accounts
- Performed outbound, cold calling as well as utilized traffic flow to help build a customer-base
- Assessed credit worthiness for customers seeking credit cards as well as home, student or auto loans
- Discussed investment options with customers
- Utilized my customer service skills to match clients with the appropriate investment/money market product

Collections Supervisor

Metris Companies - Saint Louis Park, MN - May 1998 to July 2009

Collections/Mgmt.)

- Oversaw team of bill collectors
- Ensured that employees met production goals
- Ensured that employees complied with company standards and federal collection laws
- Created spreadsheets to show progress of employees efforts to collect debt
- Held weekly meetings with employees to go over progress/guideline changes

EDUCATION

Bachelors of Art in Communications

Augsburg College - Minneapolis, MN