

Jeff Roeper

Division Manager - Primerica Financial Services

San Dimas, CA

roeperjeff@gmail.com - (909) 241-1670

WORK EXPERIENCE

Division Manager

Primerica Financial Services - Ontario, CA - July 2004 to Present

Help train and develop district managers and below • Call clients to set up appointments

- Meet with clients to build rapport and gather information
- Put together financial plans and present them to potential clients
- Keep up with pending business to make sure it gets issued in a timely manner
- Follow up with clients to get referrals
- Interview and recruit clients to work with us on a part time or full time basis

Collector

Primerica Financial Services - Rancho Cucamonga, CA - August 2012 to July 2013

Perform extensive internet research to locate consumers via skip tracing

- Heavy outbound calling and speaking with individuals
- Writing accurate account notes to record all collection activities performed
- Recovering defaulted student loans using strategic collection techniques

Office Manager

Alonzo & Associates - Rancho Cucamonga, CA - May 2004 to June 2009

Create PowerPoint presentations

- Consistently update the company website with new and important information
- Make sure office is clean and in order for meetings
- Run Audio/Video system during meetings
- Create and duplicate new training material for agents
- Backup office computers
- Create recognition videos/picture slideshows
- Scan/fax documents

EDUCATION

Citrus Community College - Glendora, CA

2004 to 2006

San Dimas High School - San Dimas, CA

2000 to 2004

ADDITIONAL INFORMATION

QUALIFICATIONS:

- Work well without supervision
- Ability to prioritize and remain focused on the essence of an issue

- Excellent with customer support services
- Skilled at learning new concepts quickly while working well under pressure
- Familiar with Microsoft Word, Excel, PowerPoint, Outlook, etc. Type 50+ wpm