
LOUIS K YEE

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Profile

Energetic, driven, knowledgeable, personable, outgoing, communicative, professional, team-driven sales associate with ten years in banking, sales and mortgage industry. Seeking to collaborate with institution that can leverage current personal network and book of business to expand on and exceed previous sales and production. Driven track record of repeat customers with high referral rate. Consistent positive customer service experience.

Experience

Mortgage Loan Officer | Bank of America — 2012–Present

Expanded upon book of business from previous employer. Well versed in applying underwriting guidelines for conventional/government loan products for sound loan structuring. Consistent detailed loan application accuracy. Identified and captured opportunities with realtors and attorneys for recurring cross referral leads. Ability to work effectively with and develop efficient working relationships with processing and underwriting team for a more positive loan process for clients. Demonstrated ability to comply with corporate policies regarding protection of confidential client financial information in a sensitive manner. Highly adept at utilizing new software and origination platforms to execute sales leads and marketing goals.

Mortgage Development Officer | Sovereign Bank — 2007-2012

Developed mortgage referral sources through retail branch partnerships. Handled intake of walk-in applicants and branch leads. Analyzed financial and credit background to determine clients' financing objectives. Educated clients on products, pricing policies and guidelines. Gathered proper documentation for underwriting team.

Sales Consultant | Bay Shell International — 2006-2007

Procured new accounts in business development team. Maintained and serviced existing client base. Honed in on negotiation, communication, and customer servicing skills.

Branch Supervisor | Commerce Bank — 2004-2006

Managed and supervised branch staff and oversaw day-to-day operations. Resolved customer servicing issues. Assisted clients with personal and business banking needs. Consistently cross sold various banking products to existing and new client base. Upheld proper branch opening and closing procedures.

Education

State University of New York at Stony Brook — B.A. Economics, 2003

Skills

Spoken Cantonese Chinese

Certification

Life and Health Insurance Series License

References

Available upon request
