

Raquel Stewart-Noble

Consistent , and highly motivated timely individual, with great administrative skills.

Including extensive knowledge in computer software, sales, customer service, and the financial industry.

I enjoy working with the public as I am an outgoing person. I also feel it is crucial to demonstrate the importance of my job duties and expectations with no supervision required.

Fountain Hills , AZ 2624020513 rstewart1116@gmail.com

WORK EXPERIENCE

Northwestern Mutual — Sr. Financial Planner

04/2022 to 08/2023, Milwaukee, WI

- Utilized critical thinking to create digitized financial plans for subscribers.
- Built knowledge on insurance products and services.
- Acquired a knowledge of data entry, financial planning ,terminology and development.
- Improved time management skills to adhere to production expectations.
- Utilized and increase skills in computer applications such as PowerPoint, Excel Sheet,and Word Document.

Accunet Mortgage — Loan Consultant Apprentice

06/2021 to 12/2021, Waukesha, WI

- Assist clients with loan and mortgage decisions.
- Assess the financial situations of clients,and inform clients of various types of loans and pre-approved products.
- Interviewed loan applicants to provide and obtain information.
- Maintained hard copy and electronic records of all loan documents, agreements, and correspondence through various computer programs.

Empower Retirement — Financial Services Representative

01/2019 to 04/2021, Milwaukee, WI

- Obtained SIE ,Series 6, and Series 63 licenses.
- Proritize and organized tasks to efficiently accomplish service goals.
- Exceeded customer satisfaction by finding creative solutions to problems
- Demonstrated self reliance by meeting and exceeding workow needs.
- Handled high volume of customer service calls in a fast pace work environment.
- Traded stocks and bonds on behalf of clients request
- Created and maintained client profiles.

Aldis — Shift Manager

08/2017 to 12/2018, Milwaukee, WI

- Upheld company standards and compliance requirements for operations and cleanliness of all areas.
- Collaborated with staff to maximize customer satisfaction, streamline procedures and improve bottom line profitability.
- Supervised and trained customer service team members to provide exceptional service driving retention and satisfaction.
- Money handling.
- Provided excellent customer service.