

Client Service Representative Client Service Representative Client Service Representative - TD Bank Heathrow, FL Work Experience Client Service Representative TD Bank 2019 to Present Meets with customers and prospects and develops understanding of other financial objectives and needs. Assesses customer information and suggests appropriate product and service solutions. Sells customers on value and benefits of suggested alternatives and closes sales. Responsible for meeting or exceeding specific individual sales goals. Provides exceptional Customer service by meeting all Customer demands as they relate to relatively straightforward inquiries, with the support of more experienced personnel. Relationship Manager Bank Of America July 2013 to November 2018 Manage a book of business of 250 + clients. Advise clients based on financial priorities how to achieve their financial goals through structured planning. My daily obligations consisted of but were not limited to; Managing a portfolio of clients by providing exceptional client care with industry leading products, services and education. Assessing client needs, identifying/recommending solutions, and building/managing client relationships. Educate myself in financial services and knowledge of financial services industry, products and solutions. Sales experience in a salary plus incentive environment. Experience working in an environment with individual and team goals where goals were routinely met or exceeded. Grow my business knowledge and network by using a defined consultative questioning approach with clients to systematically identify client needs and appropriate solutions, as well as partnering with experts. Confidently build relationships with my clients. Gain in-depth knowledge of clients' financial life priorities and connect them to our solutions that meet their financial goals. Provide clients with a personalized rewarding experience by executing a variety of defined client engagement strategies through relationship calling, in-person conversations and referrals to specialists. Continuously learn by using resources and technologies to optimize the client experience. Responsible for providing a positive customer experience that leads to improved satisfaction and sales. My daily obligations included but where not limited to; Accurately and efficiently process transactions such as customer deposits and cashing checks Create a connection and develop rapport with customers to provide outstanding, personalized service. Listen carefully and connect with customers to understand their top financial priorities and

to uncover products and solutions that will benefit them. Meet or exceed sales goals by influencing customers to learn about products/services. Web Developer 2UP Technologies 2013 to 2017 Work collaboratively with clients and in-house agency teams to provide rapid, robust and client-acclaimed front- and back-end web development optimizing user experience, search engine ranking, views, and video upload. Education Associate Skills Bilingual, Customer Service, Customer Support, Customer Care, CSR, Call Center, Wordpress (2 years) Links <http://socializeme.tech/> <https://github.com/joelreyes23> Assessments Supervisory Skills: Directing Others Familiar August 2019 Measures a candidate's ability to motivate the performance of others through feedback to identify improvements or corrective actions. Full results: https://share.indeedassessments.com/share_assignment/v6ew5ch7j1ykwfn Management & Leadership Skills: Planning & Execution Highly Proficient August 2019 Measures a candidate's ability to effectively plan and manage resources to accomplish organizational goals. Full results: https://share.indeedassessments.com/share_assignment/pnj4hgkjczkqlhxe Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.

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