



LORI WOCK

BUSINESS DEVELOPMENT MANAGER/ CREDIT ANALYST
AND COLLECTIONS/ PROFESSION OR INDUSTRY

EXPERTISE & SKILLS

- Excellent revenue & account development skills gained in sales positions over last 11 years working independently from home office
- Proficient Sales and market development skills
- Knowledge of financial statements
- Cold calling expert, proven high results working on my own
- Experienced with
Microsoft Excel
Microsoft Outlook
Microsoft PowerPoint
Microsoft Word
- QuickBooks qualified
- Expert in building leads & mentoring teams
- Goal oriented, have met and exceeded my goals year after year
- Great skills in Contract negotiation with regards to funders and clients

EXPERIENCE

Lionhart Capital Ltd. - June 2011 – Nov 2014 & August 2016 to August 2020

- Continually built new client business within markets by pursuing strategic targets. Exceeded \$3 million in sales.
- Generating new leads to vendor and end users in the heavy and light truck industry, Construction, Material handling, Hospitality and Restaurant equipment, Transportation, tractors and trailers, and Vehicles- cars and Trucks.
- Generated leads and capitalized on valuable business opportunities to bring in new company revenue and improved bottom line profit. Exceeded quotas consistently.
- Top sales agent with in the Lionhart Capital organization
- Preparing lease documents and collecting vital information from each client to complete the transaction.
- Cold calling new dealerships as well as existing client base.
- Performed Collections calls to clients that missed payments, facilitated repossessions, working directly with the Bailiff officers.



**LORAINA6@HOTMAIL.CO
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@LORIWOCK



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- Filled court documents for liens to be placed when a client had stopped payments.
- Liaison between the client and the 40 different funding/lending companies.
- Planned and co ordinated policies and procedures regarding employee performance evaluations and training schedules.
- Identified, interviewed, and tested and trained top talent to optimize productivity.
- Developed long-lasting relationships with partners and customers and associates over the last 11 years.

Investors Group – Consultant- Nov 2014 to Nov 2016

- First year at Investors Group reaching a Pillar Status for making \$40,000 in commission. A very prestigious award within the company.
- Articulated value of various financial products, including stocks, bonds, mutual funds, and insurance policies; educated clients on benefits of individual products.



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- **Counseled clients on financial matters and provided recommendations investment opportunities, products, and services based on client needs and asset availability.**
- **Interviewed clients to assess income, expenses, insurance coverage, tax status, financial and investment goals, and risk tolerance to formulate and actualize strategic financial plans; currently administer \$3,000,000 client investment portfolio.**
- **Consulted with clients to assess and meet short- and long-term financial goal.**
- **Assisted clients with planning for and funding retirements using mutual funds and other strategies.**
- **Cultivated and expanded financial planning relationships with customers through loyal and dedicated service.**
- **Maintained knowledge of regulations, communicated with industry professionals, devised financial models, conducted sensitivity analyses, and gathered financial reports to deliver superior service.**



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EDUCATION

DEGREE • DATE EARNED • SCHOOL

- 2017 Chinook Collage = QuickBooks coarse 1
- Grade 12 Diploma

VOLUNTEER EXPERIENCE OR LEADERSHIP

- Volunteer work:
 - Executive board member and the Treasurer for my community Association.
 - St. Mary's Church, preparing and serving Sunday dinners



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