**Brody Faltermeyer**

**815 NW Naito Parkway**

**Portland, OR 97209**

**brodyfalt@gmail.com**

**Profile**

A professional looking for a successful career with a business that will utilize my accomplishments, client relations experience, and education in managerial and executive capacities.

**Qualifications**

Strong project management and time management skills.

Microsoft Office proficiency: Word, PowerPoint, Excel

Attention to detail.

Strong ability to multitask under pressure

Collaboration and teamwork skills.

Excellent writing and communication skills.

Ability to meet time lines, and stay on target.

Ability to escalate production to meet requirements.

Series 6, 63 and Oregon Life and Health Insurance Licenses

**Education/Accomplishments**

***Education*  *Community Involvement***

University of Oregon 2007-2010 Volunteer History

Bachelors of Science in Economics Wells Fargo Volunteers

Central Oregon Community College 05-07 Economics Tutor

Business Marketing and Management

Lewis and Clark High 2001-2005 Soccer Coach

3.5 GPA Golf Team Bend Oregon Parks and Recreation

**Experience**

2012-Present

ING Financial Partners, Financial Services, Portland, OR

**Relationship Manager/Administrative Assistant/Registered Representative**

* Maintain approx. 4k client relationships
* Facilitate trades with our trading desk
* Assisting with all aspects of administrative management, directory maintenance, logistics, equipment inventory and storage
* Schedules problem reviews with management and follows up on assigned actions, serves as point of contact for daily operation information and updates.
* Coordinating between departments and operating units in resolving day-to-day administrative and operational problems
* Create a customer service environment that is unparalleled. (phones, face to face, email, other employees) Assisting, screening and/or selectively referring callers
* Taking initiative; follow through on requests until completion, and strong attention to detail.
* Tracks and reports project and daily work flow status, identifies daily operational issues and escalates to avoid processing delays

2011-2012

Wells Fargo, Banking Services, Portland OR

**Banker Assistant/Foreign Exchange Specialist**

* Quote unit exchange rates, following daily international rate sheets or computer displays.
* Inform customers about foreign currency regulations, and compute transaction fees for currency exchanges.
* Examine checks for endorsements and to verify other information such as dates, bank names, identification of the persons receiving payments and the legality of the documents.
* Balance currency, coin, and checks in cash drawers at ends of shifts, and calculate daily transactions using computers, calculators, or adding machines.
* Create detailed reports on the amount of currency sold, requested, and bought in order to prepare inventory for coming days.
* Updates documents, reports, and/or group transactions

2010

First Investors Corporation, Financial Services, Beaverton OR

**Registered Representative**

* Built a client base from scratch through direct mailing, info seminars and effective prospecting
* Developed an expertise in employee benefit plans, 401k, 403b, Life Insurance, Tax savings
* Accurately filed all necessary documentation and applications
* Coordinates reviews and follows up on assigned actions
* Responsible for managing and coordinating activities associated with new interns

**References**

Available upon Request