

Experience

Financial Services Representative Sandy, UT 2015 - 2016**E*TRADE Financial**

- Answered approximately 50 inbound phone calls daily
- Promptly gave accurate and appropriate information in response to customer concerns
- Promoted to Tax and Retirement specialty team within four months
- Knowledgeable in general securities and delivered information in compliance to FINRA regulations
- Displayed thorough knowledge in current IRS regulations for tax filing and retirement plans
- Facilitated information between customer service, account management, and quality assurance
- Met sales goals consistently

Teller American Fork, UT 2014 - 2015**Wells Fargo Bank**

- Processed paying and receiving transactions for all product types and services
- Managed customer inquiries and complaints
- Cross-sold bank services and products to meet teller referral targets
- Recorded all transactions in compliance with FDIC and company procedures
- Built genuine client relationships while maintaining professional environment

Data Entry and Customer Service Orem, UT 2013 - 2014**Planet Fitness**

- Served as the sole data entry specialist: recorded, edited, and entered all information regarding new, current, and former memberships
- Entered sales transactions for members including program, service and product payments
- Processed all billing changes, electronic funds transfers, and account payments
- Provided outstanding customer service and quickly and efficiently responded to member and guest concerns
- Directed multiple phone sales calls and conducted facility tours

Executive Assistant to VP of Marketing Sherman Oaks, CA 2012-2013**Ideal Living Management**

- Provided continuous support and acted as the VP's first point of contact, managed personal daily schedule
- Conducted and carried out background research for multiple marketing projects
- Proofed and edited presentations, reports, and database entries
- Screened and directed incoming calls, inquiries, and requests and responded when necessary
- Planned major new hire relocation from out of country including travel and permanent living arrangements
- Sorted, arranged, and categorized immense volumes of information

Skills

Microsoft Office
Series 7 License
75 WPM
Data Entry

Organized
Leadership Abilities
Staff Training
Multi-line Phones

Time Management
Self-Motivated
Goal-Oriented
Multi-Tasking

Education

Neuqua Valley High School
Utah Valley University

2010 Diploma

Communications

In Progress