Jeffrey Zenko, CRPC®, CSPO®

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https://github.com/codemodeactivate

TECHNICAL EXPERIENCE

Technical Proficiencies: HTML/CSS/JavaScript, Git, WordPress, Node.js, Express.js, SQL, React, MongoDB, Bootstrap, VS Code, Mocha, Bulma, Tailwind, jQuery, Confluence, Jira, Trello, Miro, Inkscape, Salesforce

Working On: Next.js

Recent Work: https://grappling.camp

Case Western Reserve University Full Stack Coding Bootcamp
Graduation: August 2023

PROFESSIONAL EXPERIENCE

EMONEY ADVISOR, PA, JANUARY 2019 TO PRESENT
SENIOR CLIENT SUCCESS COACH

- Serve as success coach to onboard new and existing advisors to eMoney focusing on implementing the new software into their existing processes or creating them if they do not yet exist.
- Mentor new coaches by providing helping them enhance skills, providing frameworks, and examples of structures proven to be successful.
- Leading two Epics – 1. enhancing Salesforce/Outreach to fit our team's unique needs and 2. creating a confluence Space to serve as our own internal Wiki and act as a single source of truth.
- Participate in journey mapping research acting as the subject matter expert for coaching to examine onboarding process from start to finish.
- Coach firms of multiple advisors with unique structures and requirements while balancing a full regular coaching workload, in addition to the aforementioned projects.

CITIZENS BANK, WILLOW GROVE, PA, MAY 2017 TO JANUARY 2019
PREMIER ADVISOR

- Serve as primary Wealth Management contact for affluent segment ($500k - $3MM+).
- Spearhead proactive outreach and facilitate holistic conversations to uncover needs and goals.
- Leverage coaching activities for driving new business in order to help partners uncover additional opportunities and increase transitioning prospect skills through appropriate channels.
- Acquire deposit, lending, and investment revenue by consistently meeting goals. $2.2MM in investments, $2.2MM in lending, $3.6MM in new deposits.
- Track activities and opportunities as well as manage entire sales lifecycle utilizing Salesforce.
- Source new opportunities by drafting and sharing custom reports with other Premier Advisors.

PNC BANK, AMBLER, PA, SEPT 2015 TO MAY 2017
PRIVATE CLIENT GROUP RELATIONSHIP MANAGER

- Acted as primary point of contact for 350 affluent clients.
- Engaged clients in holistic conversations regarding deposits, credit, liquidity, investments, retirement, insurance, estate planning, business succession, and more.
- Liaised with proper subject matter experts as needed.
- Charted the successful development of book of business through proactive outreach, business relationship development, and the highest level of care and attention to sensitive needs.
- Oversaw robust pipeline for multiple lines of business, prospects, and centers of influence.
- Outperformed unit and growth goals across various lines of business on a consistent basis.
- Exceeded the performance of peers with similar sized books.

- Coached and mentored underperformers and shared success stories and ideas to win more business.
- Trained new onboarding Relationship Managers.

BANK OF AMERICA, PENNINGTON, NJ, AUG 2011 TO AUG 2015

RETIREMENT EDUCATION SPECIALIST

- Created qualified leads for advisors and vectored participants to proper channels, including EDGE, Merrill Lynch, and US Trust, in order to focus on asset retention.
- Promoted the start of advisory relationships by educating high net worth participants with at least $250K in investable assets on current options within and outside of the plan.
- Aligned objectives and bridged communications with advisors to review individual client situations and provide strategy assistance.
- Identified outside assets and potential areas for savings and tax avoidance, such as net unrealized appreciation, Roth conversions, irrevocable trusts, and banking products.
- Managed pipeline of leads to follow up regularly with prospective clients and financial advisors.

SENIOR REGISTERED REPRESENTATIVE

- Demonstrated comprehensive knowledge of various ERISA rules and regulations, investment analysis, and IRS plan documents and regulations.
- Serviced inquiries and transactions for high-profile participants while identifying opportunities for asset retention and partner engagement.
- Optimized internal service levels and user experience by suggesting AJAX on client-facing and internal applications.
- Boosted efficiency and productivity across applications by participating in multiple Six Sigma projects.

TD BANK, LEVITTOWN, PA, JUNE 2007 TO JULY 2011

FINANCIAL SERVICES REPRESENTATIVE

- Assessed customer financial needs, investment time frame, and risk tolerance in order to cross-sell investment and insurance products.
- Delivered effective investment/insurance solutions, including mutual funds, fixed annuities, life insurance, and IRAs.
- Negotiated and resolved significant customer issues related to banking products and services.
- Guided and supported less experienced staff as senior salesperson of the store.

EDUCATION AND CREDENTIALS

BACHELOR OF BUSINESS ADMINISTRATION (B.B.A.) IN FINANCE AND REAL ESTATE, 2009

Temple University, Fox School of Business, Philadelphia, PA, USA

CERTIFICATIONS

Charted Retirement Planning Counselor (SM)
Certified Scrum Product Owner