

Highly motivated financial professional looking for an opportunity in the personal banking field. A professional individual who never misses an opportunity to learn more about financial services and better serve clients. Looking forward to a new opportunity where I can educate and help clients reach their financial goals.

CERTIFICATIONS:

- Full Stack Bootcamp UCSD Extension
- Series 7 License: August 2017- August 2018
- California Insurance License: August 2017 – August 2018

SKILLS: Complete Knowledge of MS Office, Workday, Regent, CampusVue, Customer Service/Customer Relations (5+ years); Team Development/Supervision; Inventory Management

EDUCATION: BA Economics and Admin. Studies: Finance – University of California, Riverside 2016

EXPERIENCE:

Ashford University – San Diego, CA (June 2018-Present)

Financial Services Advisor

- Counsel students on student finance opportunities and the proper application process.
- Communicate institutional policies and procedures to students by conducting phone consultations.
- Counsel students on the document intake, awarding, and disbursement processes.
- Counsel prospective students to ensure they successfully complete the application process in a timely manner.
- Maintain a working knowledge of Federal, State and Institutional Policies governing Title IV student aid programs
- Worked to develop customer service techniques to better resolves situations with escalated or unhappy students
- Gained working knowledge of U.S Department of Education websites, Regent as well as Workday.

MassMutual– San Diego, CA (January 2018-June 2018)

Financial Services Professional

- Created and maintained own book of business in financial services field
- Provided Disability, Long-Term Care and Life Insurance
- Assisted in design of various types of retirement accounts
- Serviced clients with an exemplary level of customer care
- Passed the Series 7 and California Accident, Life and Health exam

Waddell and Reed– Riverside, CA (January 2017-December 2017)

Financial Services Professional

- Studied for and took the Series 7, Series 66 exams and California Accident, Life and Health exam
- Attended training on Financial Planning and how to grow our book of business
- Created basis for book of business when finished licensing
- Worked with other advisors to better understand clients needs.

West Riverside Veterinary Hospital – Riverside, CA (August 2012-September 2015)

Veterinary Assistant

- Assisted Veterinarians with everything that took place in the hospital, which included taking X-Rays, Pharmacy Technician, interacting and handling animals large and small during exams
- Provided excellent customer service
- Assisted with taking care of animals staying overnight in the hospital
- Trained current and new employees on any new work materials
- Assisted with Inventory duties and ordering of new supplies