

David Morris Booth-Metwally
Financial Services Professional

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Tech-savvy financial services and support professional empowering users through product education and financial knowledge. Thrives on delivering quality customer service and achieving goals through building rapport. Leverages technology to interpret and solve complex problems. Passionate about innovative financial technology solutions and services.

TECHNICAL SKILLS

Google Apps, Microsoft 365, Cisco Systems, MacOS, Windows 10, Jira Ticketing System, Confluence, Salesforce CRM, HTML/CSS, Javascript, terminal commands, tech support

PROFESSIONAL EXPERIENCE

LendingClub | San Francisco, CA
Payment Solutions Specialist

June 2018 - Present

- Respond to over 100 inbound and outbound calls daily, advising borrowers on LendingClub's loan payment guidelines and policies
- Provide payment solutions to borrowers, allowing them to meet their financial goals and reduce negative impact on credit
- Notate all borrower communications in internal tracking system, providing detailed documentation to help other team members understand previous account interactions
- Negotiate payment arrangements with borrowers for past due accounts to ensure LendingClub investors receive maximum returns (ROI)
- Maintain above average monthly metrics for bringing accounts past due to current and received recognition within team for having highest score in October 2018
- Consistently achieve QA scores of over 90% through effectively resolving borrower issues and providing an exceptional support experience

Bank of America | San Francisco, CA
Relationship Banker

July 2015 - October 2016

- Built and deepened relationships with clients by uncovering financial needs and customized recommendations based on best products, services, and solutions that meet those needs
- Educated and trained clients on how to conduct simple transactions through self-service technologies
- Drove overall revenue growth by ensuring that clients were connected to appropriate teams helping to achieve their financial goals
- Effectively generated business referrals through partnerships with specialists and businesses
- Accurately processed transactions based on established policies and procedures, building customer confidence and trust in products

Operation HOPE | Oakland, CA
Youth Financial Education Program Fellow

Nov 2014 – Jun 2015

- Taught financial literacy workshop to youth from ages 10 -16 within the Oakland Unified School District on banking fundamentals, including concepts in budgeting, banking, credit, and investing
- Developed materials and resources for outreach to volunteers, schools, and community-based organizations
- Assisted with special events, volunteer training, and school recruitment
- Helped manage organization's online presence through social media efforts
- Responded to general inquiries about HOPE Business in a Box (HBIAB) classes and volunteer opportunities

VOLUNTEER EXPERIENCE

San Francisco Achievers | San Francisco, CA
SF Achievers Scholar & Alumnus

May 2013 – Present

- Deliver speech to organization members, scholars, and donors at award ceremonies to highlight the efficacy of scholarship program
- Offer academic mentorship to current scholars

EDUCATION

UC Berkeley Extension | San Francisco, CA
Certificate of Completion: Full-Stack Web Development

April 2018

San Francisco State University | San Francisco, CA
Bachelor's of Arts: Political Science

May 2013