Yvonne Hebebrand

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# *Qualifications Summary*

Administrative support professional experienced working in fast paced environments demanding strong organizational, technical and interpersonal skills. Trustworthy, ethical and discreet, committed to superior customer service. Confident and poised in interaction with individuals of all levels. Detail-oriented and resourceful in completing all job duties; able to multi-task effectively. Capabilities included:

* Series 63 & 7
* Call Center
* Mutual Funds
* Retirements
* Insurance Products
* Relationship Building
* Marketing

# *Professional Experience*

Edward Jones-Keene, NH 03431

2008 to 2011

##### Registered Branch Office Administrator

* Prepare client portfolio reviews for Financial Advisor.
* Research cost basis information.
* Follow up on all client requests and mailings.
* Process check deposits and scan documentation
* Communication with venders and home office.
* Assist in creation and implementation of marketing plan.
* Event planning.

Wachovia Securities, Keene, NH 03431

2006 to 2008

**Registered Financial Associate**

* Prepare portfolio reviews and security reports for Financial Advisor.
* Resolve and respond to client inquiries such as security prices, balances, forms etc.
* Research security cost basis.
* Keep appointment calendar.
* Take unsolicited trades from clients and process.
* Work with home office to resolve account problems and initiate corrective measures.
* Communication with fund companies and transfer agents to expedite client requests.
* Open and close office.

PC Connection-Keene, NH 03431

2005 to 2006

***Delivery Support***

* Track shipment for clients and ensure delivery.
* Navigate carrier internet sites.
* Work closely with the carriers and sales team*.*

Putnam Investments-Franklin, MA 02038

2000 to 2005

***Client Support Administrator***

* Develop relationships with clients through assisting with NSCC trading.
* Account maintenance and a variety of clerical requests.
* Reconcile short term trading fee and contingent deferred sales charges for Omnibus firms.
* Research, identify and resolve issues for back offices accurately and expediently.
* Assisted in processing adjustments.

Education

Dean College-Franklin, MA 02038

Associate in Science, Accounting

National Association of Securities Dealers, member 63 & 7