*132 W Alvord St Springfield, MA 01108 (413)563-0601 Wandafontanez@gmail.com*

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| Wanda Fontanez |

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| Objective | | | | | |
| To obtain a position utilizing my knowledge and experience within a growing environment. Experienced Operations Support Representative that illustrates proficiency and demonstrate ability to work effectively within established deadlines. Strong organizational and detailed oriented skills. | | | | |
| Work Experience | | | | | |
| June 2008-August 2010- **The Wealth Technology Group**, W. Springfield, MA  ***Financial Service Assistant*** | | | |
| * Maintained Financial Representative’s appointment schedule by planning and scheduling meetings, conferences, and teleconferences | | | |
| * Welcomed guests and clients by greeting them, in person or on the telephone; answering or directing inquiries | | | |
| * Analyzed Brokerage, Annuities, Life Insurance accounts and applications to ensure compliance with FINRA and SEC Regulations * Responsible for processing all incoming and outgoing transfers and New Accounts from outside broker dealers/mutual fund companies and insurance companies * Complied and reported monthly productivity information to Representative | | | |
| * Secured information by completing data base backups * Maintained customer records by updating account information. * Resolved product or service problems by clarifying the customer's complaint; determining the cause of the problem; selecting and explaining the best solution to solve the problem; expediting correction or adjustment; following up to ensure resolution.   June 2000-February 2008-**MML Investors Services Inc.- MassMutual**, Springfield, MA  ***Operations Support Representative***  **New Accounts Specialist**   * Responsible for processing New Brokerage Account Applications * Provided guidance and expertise to Registered Representative on new accounts * Analyze Brokerage Accounts to ensure Compliance with FINRA and SEC regulations   **Asset Gathering Specialist**   * Responsible for processing all incoming and outgoing Transfers from outside broker dealers/mutual fund companies and insurance companies * Worked with the clearing firm (National Financial Services) to status and resolve escalated issues * Compiled and reported monthly productivity information to the Senior Leadership   **Treasury Operations Representative**   * Processed all monetary transactions with Brokerage Accounts including check deposits and disbursements, EFT, bank wire transactions and journals * Initiated and managed service requests via Internet/Intranet applications with National Financial Services * Reviewed documents and identified items that were NIGO (not in good order) to process and followed current procedures to ensure timely correction and processing * Adhered to strict processing guidelines while providing high quality work   **NIGO Team Specialist**   * Researched and analyzed problems for incoming work and put in good order * Participated in projects as needed such as writing New Business Policies & Procedures and work closely with other business units * Identified opportunities for continuous improvement, and take action to implement improved workflows/processes * Trained new employees in all business units in the Policies & Procedures as well as general processing guidelines * Worked with management to resolve escalated situations | | | |
| Skills/Qualifications | | | | | |
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| * Customer Service, Product Knowledge, Quality Focus, Problem Solving, Market Knowledge, Documentation Skills, Listening, Phone Skills, Resolving Conflict, Analyzing Information , Multi-tasking * Excellent written and verbal communication skills, fully bilingual English/Spanish * Microsoft Office: Word, Excel, Access, PowerPoint | | | |
| * Massachusetts Notary | | | |
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| Education | | | | | |
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| **Massachusetts Career Development Institute**, Springfield, MA  *Office Technology*  **Springfield Technical Community College**, Springfield, MA  *General Studies* | | | |
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| References | | | | | |
| Available Upon Request | |  | |
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