**Caroline R. Malaquias**

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**OBJECTIVE**

To obtain a position as an Executive, Administrative or Broker’s Assistant in the Financial Services Industry.

**QUALIFICATIONS**

* Proficient in the use of various software packages including Microsoft Word, Excel, Outlook, Copy Talk Dictation, Net Exchange Pro and Albridge Solutions Financial Reporting.
* Able to complete complex assignments on tight deadline.
* Extensive knowledge of the insurance industry including application entry and underwriting follow-up – (Life, Disability, Long-Term Care and Annuities).
* Extensive knowledge of the financial services industry, including fund transfers, rollovers (annuities, mutual funds, IRAs, pension plans, etc.)
* Preparation of financial reports, bulletins, newsletters and weekly sales bulletins.
* Skilled in interpersonal relationships, on the telephone and face-to-face.
* Meeting arrangements and travel preparation
* Compose, prepare and manage business correspondence.
* Data entry and preparation of client financial planning analysis

**ACHIEVEMENTS**

* Maintained strong work relationship with high-level financial executives.
* Coordinated daily operations for 21 branch offices with sales managers, administrative staff and regional executive.
* Maintained business calendar and activities.
* Prepared itineraries, scheduled appointments and arranged business trips.
* Worked as a personal assistant to top 4 producers in the local sales office, handling all aspects of their daily activities, including assistance in attaining company conference qualification and MDRT.
* Worked as an Associate Financial Representative providing administrative, insurance, investment and financial planning assistance to 2 high level Financial Advisors on a daily basis.

**WORK HISTORY**

* 2007-Present Financial Advisor Assistant Northwestern Mutual; Springfield, MA
* 2003-2007 Financial Advisor Assistant Northwestern Mutual; Northampton,

MA

* 2002-2003 Financial Advisor Assistant Amex South Hadley, MA
* 1996-2002 Senior Sales Support Assistant MetLife Financial Services; Holyoke, MA
* 1986-1996 Executive Secretary/Regional Analyst/Coordinator; Metlife Financial

Services; Longmeadow, MA

**EDUCATION**

* Baypath Jr. College; Longmeadow, MA
* St. Mary’s High; Westfield, MA
* Life and Accident & Health Insurance Licensed
* Series 6 & 63 Licensed