

Eric Lopez

Information Governance

714-322-6754 | e.lopez.7.el@gmail.com | Fountain Valley, CA

Detail-oriented professional with experience in records management, Microsoft Office and customer service. Frequently praised as hard-working by peers, I can be relied upon to help your company achieve its goals. Adaptable professional with 10 years of work experience and a proven knowledge of executive support, staff training and development, and workflow prioritization. Aiming to leverage my abilities to successfully benefit your company.

EXPERIENCE

McDermott, Will & Emery/Williams Lea; Irvine, CA

Administrative Assistant [Information Governance](Contractor) 06/2022 - Current

- Manage the Filing Room/Information Governance Room for that location keeping it organized
- Transfer legal paper files to digital for lead attorney
- Quality check said legal files in order for them to be legible and ready when needed
- Input data for files into the company's network so the files can be easily accessed
- Review files already in the system as digital and determine if they qualify for shredding
- Regular office work (when needed)

Ultimate Software Group, Inc.; Santa Ana, CA

Tax Operator (Contractor) 10/2018 - 10/2019 & 02/2020 - 03/2020

- Co-Lead in 1st Quarter End for SUI/SIT and Locals were I help develop an organization and filing system
- Assisted the Special Projects team with Recon/Amendments to determine which tax returns had variances and if so, by how much.
- Prepared and assisted in preparing simple to complex tax returns for individuals and small businesses.
- Clients assigned to special projects were considered high priority and retention was upmost. A big part of this position was to make sure the clients were taken care of,
- Assisted in the Uncleared Checks Project; Researched the issue of the checks for void and refund/reissue and contacted the agencies
- Called Unemployment and Withholding agencies in order to set up, audit or reactivate customer accounts
- Help determine whether there are any filing errors and determine if an amendment filing is needed for Special projects
- Supported various departments and teams such as, Triage, SUI Rate Change, CMP, The NTR team
- Tax Notice, Quarter End Support, Quarter End Lead (SUI/SIT) and Special Projects
- Navigate Salesforce and determine the correct department for cases as well as determine the urgency
- Assisted Special Projects with Calling State Agencies to audit Tax Returns as well as updated the Auditing Spreadsheet once the necessary information is obtained
- Assisted Special Projects in Creating an Auditing Spreadsheet for Tax Return Audits
- Assisted in 3rd Quarter End and 4th Quarter End with organizing and matching Tax Returns for Local, State and Federal
- Once organized and Matched, logging off the tax returns in the WST Portal

Old Republic Servicing Solutions (L.A.N.I.); Orange, CA

Senior Valuations Coordinator (Hired on) 06/2014 - 02/2018

- Contacted real estate agents and appraisal agencies and negotiate a reasonable fee and time for them to perform a Broker Pricing Opinion (BPO) and appraisals on properties

- Made sure all real estate agents submit the BPO(s) in a timely manner in order for the review team to review and complete.
- Handled RUSH Broker Pricing Opinions (BPOs) and appraisals.
- Handled late BPOs and appraisals other coordinators were having trouble with.
- Responsible for Managing Broker Pricing Opinions (BPOs) ordered by PNC.
- where they input the data for the BPOs by walking them through various processes.

Equity Pointe Asset Services (L.A.N.I.); Irvine, CA

Valuations Coordinator

09/2013 - 01/2014

- Contact real estate agents and negotiate a fee and time for them to perform a Broker Pricing Opinion (BPO) on properties.
- Minor Tech Support/ assisted real estate agents when they had trouble logging into their online system accounts where they input the data for the BPOs by walking them through various processes.
- Review the BPO the real estate agent has done and verify that the information they have inputted is correct and accurate with Tax records and previous BPOs.
- Found a new real estate agent and talked them into joining our network which resulted in 30% more agents.
- Answer real estate agents' concerns and engage with the agent if they have any questions.

First Resolution Financial, Inc.; Newport Beach, CA

Lead State Coordinator / Jr. Loan Processor

10/2012 - 11/2013

- Qualified clients for mortgage refinancing (HARP 2, FHA, VA) which helped me gain knowledge in ordering Title and Escrow.
- Professionally answered clients questions and as best I could so that the client's can make the right decision for themselves
- Assisted the Sr. Loan Processor and Loan Officer by collection the client's qualifying documents and entering them and other necessary information into the system they used Encompass.
- I also assisted the Loan Processor in any other tasks they needed (copying, scanning, etc)
- Created spreadsheets to improve management of loan files and reporting accuracy.
- Collaborated closely with underwriting and sales to obtain loan approval.
- Monitored loans within pipeline to prevent delays or interruptions.
- Identified customer needs to explore options and suggest different types of loans.
- Calculated, reviewed and corrected errors on interest, principal, payment and closing costs using computers and calculators.

EDUCATION

Los Amigos High School - Fountain Valley, CA GPA: 3.00

Santa Ana College - Santa Ana, CA GPA: 3.60

SKILLS

Microsoft Office Suite– Excel, PowerPoint, and Outlook, 75-85 WPM and 7,000-8,000 KSPH ,Bilingual (english and spanish), Analytical and problem solving, Enterprise resource planning software, Business and leadership, Verbal and writing skills, Data analytics, Creative and Critical Thinking, Workflow Scheduling, Workflow Planning, Employee Training