**Mary B. Callahan**

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**Professional Summary**

I am a highly motivated customer-centric, 2-15 licensed agent with more than 12 years of experience working for a benefit broker, with an emphasis on partnership and forward-thinking benefit design and the utilization of HRIS systems. Accomplished executive assistant to the owner / broker of the business. Responsible for playing a key role in the day to day operations.

**Employment History**

*Executive Assistant and Account Representative – BenTec Workplace / US Employee Benefits*

*February 2007 – Present: Jacksonville, FL*

* Works well under pressure, meets deadlines and is very organized.
* Screening telephone calls.
* Assisted Bookkeeper with Invoices and commissions.
* Processed monthly Sales Tax.
* Ability to organize calendars and daily office tasks accurately and quickly.
* Track licenses and continuing education for all associates.
* Discuss job performance problems with employees to identify causes and issues and to work on resolving problems.
* Manage the operation and maintenance of office equipment and troubleshoot issues involving office equipment, computer hardware and software.
* Compile, copy, sort and file records of office and business transactions.
* Provide excellent customer service in a pro-active, professional and friendly manner.
* Handle complex, confidential documents and issues with discretion.
* Compute, record and proofread data.
* Plan and coordinate holiday events.
* Schedule travel as required for all associates.
* Prepare meeting agendas, attend and lead meetings.
* Plan and conduct new employee onboarding / orientation and annual benefit enrollments for clients.
* Assist in the development of new business by preparing proposals and making presentations.
* Meeting and greeting visitors.
* Correspond with field representatives to obtain additional information, quote rates or explain underwriting policies.
* Interpret and explain human resources policies, procedures, laws, or regulations to include matters such as equal employment opportunity and sexual harassment and recommend needed changes.
* Serve as a link between clients and their employees by managing questions, administrating benefits and resolving benefit and claim related issues.
* Provide an in-depth knowledge of health and supplemental insurance coverage, carriers and products offered.
* Communicate with clients, employees and other individuals to answer questions, explain information and address complaints.
* Compute wages and payroll deductions.
* Possess proficiency in finance and compliance, relating to IRA’s, Simple Plans, 401K’s and 529 College plans.
* Conduct and execute annual financial audits.
* Conduct audits of our small groups to ensure billing accuracy and commissions are correctly paid.
* Research and resolve all customer inquiries to include life events, terminations, maintain and update payroll records.
* Maintain all employment records using human resources management system (HRIS) software.

Complete, verify and process forms for administration of benefits medical insurance and retirement plans.

* Supervise all office responsibilities to quality standards, deadlines and proper procedures as well as streamline business efficiency.
* Adapt quickly and efficiently to changing priorities.

*Administrative Assistant - North Florida Financial Corp.*

*June 2004 – January 2007: Jacksonville, FL*

* Supported two financial advisors: scheduled client visits, interacted with clients (via written and verbal communication). Maintain and update client database.
* Liaison between clients and underwriter.
* Reserve and confirm seminars, symposiums, etc.
* Perform other duties and special projects as needed.
* Assisted with completion and accuracy of insurance, financial and annuity paperwork.

*Registrar and Finance Officer - Career Training Institute*

*October 2000 – May 2002: Orlando, FL*

* Added new students to database, determined government grant money, scheduled classes, posted grades, created report cards, posted monies received from grants and student loans.
* Maintained database, created a step by step procedure manual for the Class System.
* Updated student credits to receive government funding, obtained promissory notes, and calculated Title IV refunds for student drops.
* Assisted with ongoing regulation reports (IPEDS, SSCR).

*Universal Customer Assistance Team / Supervisor / Development & Training - AT&T*

*October 1995 – February 2000: Jacksonville, FL*

* Facilitated training programs including technology (CSIDS), sales and customer service/problem resolution (soft skills) courses, regularly scheduled training for 360 employees to ensure company objectives were achieved within appropriate deadlines.
* Selected to participate in a pilot program designed to achieve greater consistency in resolving both internal and external customer issues by identifying and documenting feedback from training course participants.
* Provided guidance and training in handling complex and difficult situations.
* Schedule associates for new or updated programs.
* Prepare and distribute Job Aids as needed.
* Participate in Train the Trainer calls.
* Coached associates to help them improve performance.
* Reviewed and discussed employees’ job performance, recommended additional training if needed.
* Furnished management with feedback / documentation related to performance appraisals.
* Received Honorable Mention for the President’s Award in Call Servicing.
* Received True Hero’s.
* 1994 Member of the division awarded the Malcolm Baldridge award.
* Completed “Associate to Management Advancement Process”

**Software**

Microsoft Office, IADS, CICS, Class, Fame, EZ Data, Employee Navigator, Benefits Selection or Selerix, Ring Central Meetings, WebEx meetings, Medcom for COBRA, Principal 401K, Access Blue, NetX360.

**Education**

2005-2006 **SIU at Carbondale - Mayport FL**

*Bachelor of Science Degree in Workforce Education, Training & Development.*

Internship successfully completed at JEA

1993-1995 **University of Wisconsin, Madison**

1988-1992 **Madison Area Technical College**

*Associates Degree Business Mid-Management*

**License**

2-15: Health & Life (Including Annuities & Variable Contracts) Agent License

**Volunteer**

Donate Blood/Platelets, 18 gallons with One Blood

Campus Coordinator, Church of Eleven 22

Disciple Groups, Church of Eleven 22 and Celebration

Participated in Disney Princess 5K, ALS 5K and others

Big Sister to hearing impaired girl. (Big Brothers & Big Sisters)

Volunteer as a Buddy for Night to Shine with Tim Tebow Foundation

Mission trip to Zimbabwe with One Child Matters and Celebration Church