

Contact

www.linkedin.com/in/elisha-oliver-834587b9 (LinkedIn)

Top Skills

Financial Analysis

Finance

Banking

Languages

English

Elisha Oliver

Customer Experience Focused

Charlotte, North Carolina, United States

Summary

- 10 years of banking/financial experience with Bank of America, Merrill Lynch, Morgan Stanley Smith Barney, LPL Financial
- Experience reviewing, entering, and processing data
- Knowledge of current compliance related rules that govern the financial industry including but not limited to Anti-Money Laundering (AML), late day trading, Privacy Act, and US Patriot Act
- Advanced EXCEL skills
- Ability to analyze and process documents with strong attention to detail
- 15 years of call center/customer service experience
- 10 years administrative and clerical experience

Experience

Verizon Wireless

Support Coordinator

July 2015 - Present (7 years 10 months)

Charlotte, North Carolina Area

- Troubleshooting Verizon Wireless devices
- Perform call audits
- Take inbound calls from Verizon Wireless customers in regards to their Verizon Wireless accounts
- Assist with making payments, phone orders, Internet orders, and selling of Verizon Wireless plans and services

LPL Financial

Tax Reporting Analyst (contractor)

January 2015 - May 2015 (5 months)

- Assist with company and investor reporting
- Review, analyze, and audit 1099R, 1099C, and K-1
- Assist with resolving accounting or finance problems, management questions, or other research projects

- Support in the preparation of tax forms utilizing Beta, Compliance Plus, and other internal operating systems

Bank of America

Fulfillment Operations Specialist (contractor)

October 2014 - January 2015 (4 months)

- Resolve, research, and adjustment inquiries within the banks practices and procedures
- Answer service request and inquiries received from other departments
- Maintain internal operational and financial controls and ensure all assigned cases have been resolved in a timely manner
- Provide research support for the department case management system and financial controls

SEI Investments

Regional Investment Consultant

October 2012 - August 2014 (1 year 11 months)

Oaks, Pennsylvania

- Provide account and operational management to Financial Advisors through daily support and interaction
- Educate and assist Financial Advisors with implementing best practices to more effectively use Middle Office products/services to meet their business needs
- *-Participate in department projects to improve current process and/or system
- Provide knowledge and assistance to Financial Advisors with current compliance related rules that govern the financial industry, including but not limited to Anti-Money Laundering (AML), late day trading, Privacy Act and US Patriot Act

Morgan Stanley

Operations Specialist

October 2008 - September 2012 (4 years)

Jenkintown, Pennsylvania

- Review and process account opening documents, and account transfers via ACAT
- Process monetary distributions, cash receipts, and deposits
- Assist Financial Advisors with research and operational support within branch office
- Assist with administrative and clerical duties for Financial Advisors within branch office

Merrill Lynch

Business New Accounts Team Lead

March 2005 - September 2008 (3 years 7 months)

Pennington, New Jersey

- Answer inbound calls from Merrill Lynch Financial Advisors regarding business new accounts
- Review, analyze, and process account opening documents
- Assist with escalated calls within the business team
- Audit, monitor, and review calls from employees within the business team
- Assist with employee evaluations within the business team
- Assist Financial Advisors with trouble shooting Merrill Lynch operating systems

Bank of America

Mortgage Production Specialist

August 2002 - February 2005 (2 years 7 months)

- Answer inbound calls from Bank of America professionals regarding Loan Rate Modifications, -Escrow, Private Mortgage Insurance (PMI), Loss Mitigation, Foreclosure, etc
- Assist with payment arrangements and process payments
- Assist with escalated calls within the call center
- Review, and process mortgage documents

Allstate

Claims Service Representative

October 1998 - May 2002 (3 years 8 months)

- Answer inbound calls from Allstate and non-Allstate insured clients related to auto and homeowner claims
- Gather pertinent details of auto accidents and homeowner incidents for Claims Adjuster reports
- Assist with making arrangements for auto vehicle estimates and repairs
- Assist with making arrangements for homeowner evaluations and appraisals
- Complete clerical and administrative duties for assigned Claims Adjusters

Education

University of North Carolina at Charlotte

Bachelor's degree, English Language and Literature, General · (1998 - 2002)