

Adrian Robinson-Nelson

PRODUCT SPECIALIST - LINCOLN INVESTMENT PLANNING INC

Upper Darby, PA - Email me on Indeed: [indeed.com/r/Adrian-Robinson-Nelson/098c5d36afb9968d](https://www.indeed.com/r/Adrian-Robinson-Nelson/098c5d36afb9968d)

I am experienced in many diverse facets of the business sector: sales, customer service, crew/client support, processing, asset management, and plan implementation which also includes administrative and clerical experience.

Authorized to work in the US for any employer

WORK EXPERIENCE

PRODUCT SPECIALIST

LINCOLN INVESTMENT PLANNING INC - Wyncote, PA - March 2015 to Present

Internally provide knowledge of financial products, policies, and securities. Performing maintenance on the products (mutual funds, annuities, employer plans) using Lincoln's internal system. Conveying all changes on Lincoln's system as well as to the in-house associates including phone associates, financial advisors, Director of Operations and doing so in a timely fashion. Managing daily reports, auditing my peers, and assisting in other projects as needed.

CLIENT RELATIONSHIP ASSOCIATE

VANGUARD - Malvern, PA - 2013 to 2015

Providing customer service to Vanguard clients. Performing financial transactions such as purchasing, selling, exchanging funds as well as making annual contributions and more. Directing clients to the proper departments/crew members.

PERSONAL ADVISORY ASSOCIATE, VANGUARD; MALVERN, PA

I assisted financial advisors in creating financial plans for clients. Auditing client's financial plans.

RETAIL FINANCIAL ASSOCIATE, VAN1600 Garrett Road, Upper Darby, PA 19082
adrian.nicole4@gmail.com (267) 815-6431

GUARD; MALVERN, PA

Processed clerical and monetary requests made by clients in a quick and efficient manner. Outcall client and Financial Institution to confirm account transfers

SERVICE ASSOCIATE, VANGUARD; MALVERN, PA

New Client Setup: process new client set-ups, organize paperwork for FA, mail welcome kit to the client and update internal systems. Client Mailings: reports (initial, quarterly and annual), letters (transition and EPC), tax mailings, and general correspondence. Back scanning Project: scan, split and create E-bindings for AMS client base and more. Coordinate all material, including presentation preparation, for client meetings prior to executive travel. Peer auditor for daily processes. Collaboration with Vanguard teams: Onboarding and Ayx Operations Team on special projects as needed.

SALES ASSOCIATE

MACY'S - King of Prussia, PA - 2011 to 2013

Provide great customer service. Serve as a lead cashier as well as selling merchandise and store credit card.

EDUCATION

Masters in Organizational Leadership

University of Valley Forge - Phoenixville, PA
2016 to 2016

BS in BUSINESS MANAGEMENT
EASTERN UNIVERSITY
2011

ADDITIONAL INFORMATION

SKILLS

My skills include data entry, office administration, teamwork, coordination, customer service, strategic planning, event planning, leading, problem resolution, implementation, and processing as well as asset management.