

XUAN (SUNNY) PHAM

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SUMMARY: Seasoned financial services professional looking for career advancement and challenging opportunities within the management team. Xuan has a proven track record to solve complex issues through innovative thinking with a go-getter attitude.

CORE COMPETENCIES:

- 8+ years – Financial Services, banking and mortgage
 - 2+ years – Supervisor/Management
 - 2+ years – Team Lead
 - 2+ years – Supervisory Roles with Direct Reports
 - 4 Training and Facilitation
 - 8+ Call center
 - 8+ Sales and referrals
 - Bilingual – English & Vietnamese
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PROFESSIONAL EXPERIENCE

Unique Nails & Spa | Orange, CA

Owner and Operator

March 2017-Current

- Manage payroll, billing and accounting
- Provide exceptional receptionist skill
- Handle appointment calendar
- Resolved guest complains and issues
- Compliance with State Board of Cosmetology and health code
- PCI compliance
- Marketing promotion strategies to attract new clients

Wells Fargo Treasury Management | Los Angeles, CA

Aug 2016 – Dec 2016

Treasury Research Analysis Lead

- Led multiple workshops to provide training regarding desktop deposit, over the counter, and escalation research management
- Managed Wells Fargo corporate modeling forecasting and provided monthly risk mitigation plans to senior leadership
- Oversaw 15+ treasury accounts and provided subject matter expertise in internal policies and government regulations
- Created multiple cost efficient and effective methodologies regarding quantitative analysis and ROI models
- Created and implemented new treasury deposit slip
- Build relationship with branch managers to create additional incentives for high value clients
- Work with outside vendors, cash processing centers and transportable companies, to locate missing or miscounted deposit
- Fully trained with the Patriot Act, Anti-Money Laundering Law, Bank Secrecy Act, etc...

Wells Fargo Home Mortgage | San Bernardino, CA

Aug 2007 – Aug 2016

Supervisory Lead / Campus Recruiter

- Lead Mortgage Supervisor responsible managing a team of 15-20 high performers
- Streamlined aged processes that reduced expenses and improved productivities at site level
- Appointed Campus Recruiter of the Year (2015) for outstanding execution of Wells Fargo's recruiting strategies and efforts; built key relationships with local university students & faculty and community student organizations
- Coordinated all aspects of the recruiting efforts including setting up career fairs, establishing interview dates/schedules, and conducting behavioral screenings
- Provided on-the-job essential skills for new hires regarding to mortgages, underwriting, lending, deposit, credits, and investment banking
- Created new ideas and implemented enterprise wide for efficiency and productivities
- Met and exceed case management goal
- Train and Facilitate new hire and tenures team members
- Administrative duties included, set up meeting, PTO schedule and training materials

- Office of the President-manage highly escalated issues to minimize litigation
- Worked with attorneys, escrows and title companies to resolve complex mortgage issues, loan document discrepancies, delinquent taxes, payment processing, etc...
- Met and exceed monthly sale and referral goals
- Maintained high quality of customer service satisfactory with above and beyond post contact survey results
- Co-editor and translator for the Vietnamese Glossary
- An Expert with RESPA guideline
- Strong knowledge with FHA, VA, FNMA and FHLMC loans

Department of Public Social Service | Riverside, CA

Mar 2005 – June 2007

Eligibility Technician Lead

- Accurately evaluated applicant's income and real property reports to determine eligibility for grants
- Key liaison to assist local District Attorney to provide policies and recommendations regarding child support & legal matters

EDUCATION

- **La Sierra University | Riverside, CA**
The Tom and Vi Zapara School of Business
M.B.A. Business Management – Management, Policy and Entrepreneurship Concentration, 2016
- **University of California at Riverside | Riverside, CA**
School of Business Administration
Bachelor of Arts – Business Management, 2004