

LILI HUYNH

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SUMMARY OF QUALIFICATIONS:

- Adaptable. Learn new things quickly. Able to acknowledge group dynamics and adapt accordingly to ensure team success
- Flexible. Skilled in working in team. Enjoy and add value to team culture.
- Strong appreciation of team oriented activities with high regard for independent assignments
- Well organized with problem solving skills
- Detailed oriented
- Creative problem solver who is resourceful, ethical and forward thinking
- Fluent in two languages - English and Vietnamese
- Strong oral and written communication skills
- Experience in developing and managing client relationships
- Experience in counseling
- Event Planning

EDUCATION:

- Bachelor of Arts in Business Administration –Double concentration: Finance, Management - University of Washington
- Phi Theta Kappa member – Level of accomplishment: Leader (over 5 Meetings, 2 Event Planning, 3 Service, and 2 Trainings)
- Insurance license: WA Life Producer
- Series 6 license: Investment Company Products / Variable Contracts Representative Examination
- Series 7 license: General Securities Representative Examination
- Series 63 license: Uniform Securities Agent State Law Examination
- Series 65 license: Uniform Investment Advisor Law Examination

RECOGNITION:

- Perfect balancing teller (Wells Fargo)
- Recognition - credit champion (Wells Fargo)
- Shared WOW reward for excellent customer service (Wells Fargo)
- Recognition from manager on Macy's "Everyday Magic Employee Recognition"
- Women in Leadership Nominee (Women in Leadership recognition reception 2015 University of Washington Bothell & Cascadia College)

COMMUNITY SERVICES: (service projects that I've planned)

- Honoring Dr. Martin Luther King Jr. program (UW Bothell)
- Nature Consortium: planning trees
- Puget Sound keeper Alliance: cleaning up arboretum waterway
- Youth Migrant Project: food banks
- 21 Acres & More than a Farms: sheet mulching, and seed preparation in the greenhouse
- Wetland Restoration and Cultural Exchange with Tulalip NW Indian College
- Threads and Treads: Clothes bank

WORK EXPERIENCE:

Member Services Specialist

Kaiser Permanente

10/2019– present

- Responds to health plan, delivery system, and governance inquiries and complaints in writing and over the telephone.
- Researches issues. Interact with other departments, physicians or administrators as needed. Resolve or escalate when appropriate.
- Identify errors and determine what corrective steps need to be taken to resolve
- Interpret and apply all benefits according to appropriate contract.

Financial Relationship Advisor

Wells Fargo Advisors

06/2018 – 08/2019

- Provide sound financial advice and counsel consistent with client goals and risk tolerance
- Provide advice and guidance on a full range of strategies to help maximize the elements of client's financial life
- Create tailored investment plans
- Areas of Focus: Advisory services, Education Funding & 529 Plan, Insurance, IRA Strategies, Retirement planning.

Registered Personal Banker

Wells Fargo Clearing Services. LLC

02/2018 – 06/2018

- license training program

Personal Banker

Wells Fargo

10/2016 – 02/2018

- Building lifelong relationships with customers
- Resolving customer issues – providing thoughtful solutions
- Asking questions, learning about customer financial needs
- Recommending products and services to meet their financial goals
- Referring customers to Wells Fargo partners

Teller

Wells Fargo

9/2015 – 10/2016

- Greeting customers and making them feel welcome
- Processing transactions for customers to help them manage their finances
- Finding ways to make financial services more convenient for customers
- Recommending additional products and services to meet customers' needs
- Referring customers to bankers

Sales Associate

Macy's

6/2015 – 9/2015

- Meeting and making a connection with customers, asking questions and listening to shoppers' needs, then giving options and advice on meeting those needs
- Inspiring the customer to open Macy's account and assist them to open Macy's credit cards
- Answering phone calls
- Cashier function: purchasing, return, payment, taking online order

Achieving Community Transformation Lead (coordinator) ***University of WA Bothell***
09/2014-06/2015

- Create a campus climate and culture of service-learning and social justice
- Plan service and/or social justice related activities for UWB and Cascadia College students and staffs
- Schedule meetings and trainings
- Recruit and train student site leaders
- Organize and lead committee meetings
- Plan major day of service events
- Budgeting
- Track and archive information on events and budgets
- Marketing:
 - ✓ Work with marketing department of UWB Student Life to prepare posters and flyers
 - ✓ Send electronic announcement
 - ✓ Setup and run registration website page
 - ✓ Club Outreach
- Develop relationships with specific community organizations, and coordinate and communicate with these organizations to plan service events on and off campus
- Communicate with organizations, clubs, partners, and volunteers through email and phone

Student Assistant

UWB Budget, Fiscal & Auxiliary Services Department

03/2014 -06/ 2015

- Assist manager
- Perform clerical tasks
- Assist making room setup map for events
- Answer phone calls