**Matthew Monroe Whittle**

email: matt.whittle10@gmail.com

Phone (801-200-2493)

Experience

**Fidelity Investments** **Salt Lake City, Utah** Dec. 2014- Present

**Annuity Service Representative** Aug 2017- Present

* Specialized in assisting clients with any servicing on their annuity contracts.
* Responsible for making updates and changes to a database tool using Microsoft access.
* Worked with developers to create a new web-based app for our departments use.
* Worked as a part time case manager to help make risk-based assessments on customer requests that were not in good order.

**High Net Worth Representative** Aug. 2015- Aug. 2017

* Serviced the high net worth clientele with any service-related needs.
* Worked with managed accounts as well as stock, mutual fund, bond, and option trading.
* Fulfilled various team roles to ensure that our team exceeded our goals.

**Financial Representative** Dec. 2014- Aug. 2015

* Assisted customers with general service and maintenance on their investment accounts.
* Ensured that we were taking care of all of the customer’s investment and retirement needs.
* Helped customers place trades in their accounts and understand how the stock market works.

**Lexus of Lindon Lindon, Utah** Apr. 2014- Dec. 2014

**Lot Technician**

* Detailed and inspected vehicles to ensure that the vehicle was to the satisfaction of the customer.
* Delivered cars to business partners whether it was another dealership or the salesman that assisted the purchaser of the vehicle.

**Enterprise Rent-A-Car Orem, Utah** Sept. 2013- Apr. 2014

**Service Agent**

* Detailed cars to solidify the Enterprise brand and what the end client expects of the rental vehicle.
* Interacted with clients if there was ever a question or concern during the rental process or picking up the rental.

**The Church of Jesus Christ of Latter- Day Saints, CA** Aug. 2011-Aug. 2013

**Volunteer**

* Supervise, teach, and train other representatives
* Developed and taught courses in leadership and teaching improvement

Education

**High School Diploma Davis High School** Graduated June 2010

**Pre-Engineering Utah Valley University** Aug 2013- 2015

**Full Stack Web Development University of Utah** April 2019 - Present

Accomplishments

* Eagle Scout Award
* Fluent in Spanish
* Series 7 & 63 Licenses
* Full Stack Web Development Certification