

# JORGE A. TREVINO

1408 Arrow Ridge Way  
El Paso, TX 79912

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## LETTER OF INTRODUCTION

Please consider this letter of introduction as an expression of my interest in exploring and identifying executive management career opportunities with your organization. I have enclosed my résumé for your review and consideration.

As my résumé shows, I have over 10 years experience in business management, financial analysis/planning, and customer service capacities in diverse business environments. My career focus is to obtain a management position where I can apply my expertise and enthusiasm to make a positive impact within a challenging environment.

I have become knowledgeable in a variety of management disciplines, including finance, law, marketing, and operations. My professional experience has placed a strong emphasis on applying critical thinking skills to make sound decisions, solve problems, and assess alternatives.

My success has been defined by strong analytical skills, solid business instincts, and considerable practical skills. In addition, my communication skills are top-notch, and I am quick to recognize and address issues when they arise. In the past, this combination of skills has allowed me to make significant contributions to bottom-line profitability. With a solid track record behind me, you can be confident that I can do the same for you.

Confident that the strength of my education and experience, combined with my dedication, energy, commitment, and attitude, will add measurable value to your organization, I would appreciate an opportunity to meet with you to discuss your needs and my potential to contribute as a team member. Thank you in advance for your attention, consideration, and forthcoming response.

Sincerely,

Jorge A. Trevino

Enclosure

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## MANAGEMENT PROFILE

*"Dedicated to meeting and exceeding organizational goals and objectives"*

Bilingual, ambitious, performance-driven Financial Advisor professional with over 10 years experience in business management, financial analysis/planning, and customer service capacities in diverse business environments. Excellent problem solving abilities combined with an entrepreneurial perspective developed through practical experience. Offer a high level of personal and professional integrity combined with strong interpersonal and influencing skills and a solid work ethic. Computer proficiencies include Microsoft Word, Excel, and PowerPoint. *Bilingual Fluency in English and Spanish.*

**Financial Management:** Successfully manage financial planning, analysis, reporting, and documenting objectives for multi-million dollar portfolios. Strong analytical and problem solving skills to improve strategic financial and operational initiatives to enhance productivity, quality, client service, and overall bottom-line performance.

**Business Management:** Organized, take-charge professional with exceptional follow-through abilities and detail orientation; oversee complex projects from concept to successful completion. Effectively prioritize a broad range of responsibilities to consistently meet tight deadlines. Oversee complex projects from conception through implementation and evaluation.

**Leadership:** Demonstrated ability to provide vision and then translate that vision into productive action. Combine strong analysis, planning, organization, and consensus-building abilities with effective problem-resolution and relationship-management skills. Recognized as a resource person, problem solver, troubleshooter, and creative leader.

**Communication/Interpersonal Skills:** Highly articulate and effective communicator, Possess strong interpersonal skills; work effectively with individuals on all levels. Respect cultural differences in business practices. Listen attentively, assess situations, and propose well-considered solutions. Bilingual with an articulate fluency in English and Spanish; personable communication style.

*Hold current NASD Series 6, 7, 63, 66, and Group I (Life and Health) licenses.*

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## EDUCATION

Master of Business Administration  
University of Texas at El Paso, El Paso, Texas

Bachelor of Business Administration in Marketing  
University of Texas at El Paso, El Paso, Texas

High School Diploma-Concentration: Business Management  
Preparatoria El Chamiza, Ciudad Juarez, Mexico

## PROFESSIONAL EXPERIENCE

**OWNER / FINANCIAL ADVISOR**  
**TREVCORP FINANCIAL SERVICES**

**2005 – Present**  
**El Paso, Texas**

- Led successful start-up and manage all daily operations of entrepreneurial business venture helping clients identify their financial goals and developing strategic plans for achieving those goals by offering superior investment management strategies designed to meet their financial objectives.

**PROFESSIONAL EXPERIENCE** *(Continued...)***OWNER / FINANCIAL ADVISOR** *(Continued...)*  
**TREVCORP FINANCIAL SERVICES****2005 – Present**  
**El Paso, Texas**

- Extensive development and portfolio management experience underscored by sound knowledge of integrated financial planning processes, cross-selling techniques, client relationship management.
- Perform comprehensive financial analysis to help clients become financially independent; identify client needs by analyzing present income and asset situation, developing appropriate financial management solutions, and providing personal client service.
- Manage \$51M investment/insurance portfolios specializing in 401K, rollovers, IRAs, school district employee retirement plans; and independent clientele base; manage 5 agents in the Medicare Advantage market, overseeing the enrollment of Medicare recipients into different private plans.

**PERSONAL BANKER**  
**WELLS FARGO BANK****2003 – 2004**  
**El Paso, Texas**

- Provided highest caliber of customer service and assistance to customers of one of the leading national banks; challenged to retain and strengthen banking relationships with existing customers as well as acquiring desirable new customers.
- Proactively served as customer's trusted financial advisor and navigator by engaging the full resources of the Bank to uncover and deliver solutions to meet their key objectives.
- Expanded existing business through fitting products to meet client needs; developed business strategies to enhance client relationships with the Bank; demonstrated ability to gain clients' trust and confidence.
- Utilized profiling analysis tools and techniques to identify cross-selling opportunities for business development. Sourced new customers through cold calling, and referrals from existing customers and "centers of influence".

**CONSUMER BANKER**  
**JP MORGAN CHASE BANK****2003 – 2003**  
**El Paso, Texas**

- Provided broad-based financial and credit services, including checking and savings accounts, loans, business revolving lines of credit, and money market accounts for consumers and small businesses; challenged to acquire new clients in the consumer and small business market.
- Worked with small local businesses formulate strategies that enabled them to grow and achieve business objectives; expanded existing business through fitting products to meet client needs, and cross selling of Bank's products and services; managed customer portfolios, and developed and managed customer relationships.

**FINANCIAL SERVICES REPRESENTATIVE**  
**METLIFE FINANCIAL SERVICES****2002 – 2003**  
**El Paso, Texas**

- Recruited to design revenue generating projects as telemarketing director; increased agency revenues by 9% through implementation of new projects.

*Professional References Available Upon Request*