1. Worked closely with clients to determine goals and recommend appropriate services to maintain long-term relationships with account holders.
2. Increased customer service rates by working closely with clients to resolve issues quickly and accurately.
3. Created accurate financial documents to present to senior leadership and minimize financial discrepancies.
4. Created and implemented business and marketing plans to drive growth.
5. Improved networking procedures to increase sales by [Number]%.
6. Worked with clients with life, long-term care or disability insurance accounts to increase profitability and account longevity.
7. Received customer applications and followed up with clients to obtain missing information before submission.
8. Handled incoming payments and outgoing disbursements.
9. Reviewed community and industry markets to increase number of clients by [Number]% and expand overall market share.
10. Increased accounts by [Number]% through efficient account maintenance and maintaining relationships with repeat clients.
11. Educated and worked with clients on ROI terms to find accurate solutions.
12. Sold [Type], [Type] and [Type] products.
13. Met with customers to assess needs, financial status and eligibility.
14. Worked with clients to develop financial planning strategies and solutions through evaluation of finances.
15. Managed finances and overall business direction through solutions-oriented problem-solving.
16. Built and deepened productive relationships with prospective and competitive customers to drive sustained growth.
17. Acted as liaison between customers and funders to increase overall funding by [Number]% and remove financial roadblocks.
18. Offered competitive commercial banking solutions and retail financing options.
19. Worked with clients to provide competitive commercial banking solutions and retail financing plans.
20. Worked with clients and finance companies to find optimal solutions for financing.