1. Screened patients with financial needs to determine assistance choices.
2. Updated accounts with latest patient, payment and insurance information.
3. Negotiated settlements and payment plans.
4. Followed up with patients and families to obtain additional information.
5. Discussed financial and insurance options with patients.
6. Managed $[Number] in client investment portfolios by providing one-on-one service when meeting with clients to understand assets, expenses and long-term as well as short-term investment goals to devise personalized financial plan.
7. Cultivated and strengthened relationships with new clients and educated clients on account services and capabilities.
8. Educated clients on various financial matters and provided professional recommendations on investment opportunities, products and services based on each clients' individual needs.
9. Helped clients plan for and fund retirements using mutual funds and other options to manage, customize and diversify portfolio.
10. Assisted clients in making beneficial and strategic decisions regarding investments, low-cash financing and sourcing overseas partners.
11. Highlighted values and educated clients on [Type], [Type] and [Type] financial products.
12. Boosted sales by [Number]% and exceeded sales target by employing consultative sales tactics and superior customer care.
13. Prepared and hosted data room while coordinating legal and advisory teams and facilitating due diligence processes.
14. Partnered with local organizations to provide specialized financial planning support to diverse populations with unique needs.
15. Researched [Type] rules and regulations, interviewed industry experts, constructed financial models, performed sensitivity analyses and compiled final reports to deliver top-notch service to customers.
16. Quickly learned new skills and applied them to daily tasks, improving efficiency and productivity.
17. Performed duties in accordance with all applicable standards, policies and regulatory guidelines to promote safe working environment.
18. Worked to maintain outstanding attendance record, consistently arriving to work ready to start immediately.
19. Collaborated with [department or management] to achieve [result].
20. Led projects and analyzed data to identify opportunities for improvement.