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William Chestnut II

**Accomplishments\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* Earned incentive trip to Las Vegas, NV
* Top Sales Associate
* Top TC, Top Kept Rate in Collections
* 4 Star Nominee
* Employee of the month for both HSBC Sales and Collections Department

**Experience\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

2008 – Present Capital Group Companies Carmel, IN

Shareholder Services / AR Core

* Use inbound/outbound calls from shareholders and financial advisors to assist them in completing transactions, such as investments, redemptions and account maintenance.
* Educate callers about American Funds services and broader industry policies. Research and resolve client inquiries.
* Accurately complete transactions, order literature requests and/or necessary forms, to complete requested service.

BSA Internship

* Process faxes and prepare investor mail for scanning for multiple companies and/or internal departments.
* Receive requests via re-work queue and evaluate the reason for the request and review imaged sources to ensure the images are clear and legible.
* Pull transcripts, tapes and microfilm that is not accessible in the system and ensures the information provided is clear and meets the needs of the requestor.

CSR Ambassador Role

* Assist during batch recruiting process by sharing an associate’s perspective with the new candidates.
* Lead candidates on a tour of Shareholder Services and the facility and answer any questions that they have about our company.
* Facilitate sessions where candidates listen to mock calls and debrief.

Web Help Queue / Web Advocate

* Assisting internal and external callers with web issues on the investor, advisor, or DST Vision websites.
* Communicates new web enhancements / initiatives in a team or department meeting setting.
* Motivates / coaches peers on how to incorporate the web into phone calls. Also navigating and supporting questions / challenges identified from associates.

Web Comments / Web Resolution Checklist (WRC)

* Respond to web comments and questions sent from investors, brokers, or general visitors to the American Funds’ websites.
* Working Electronic Notification Activity Report (8078 report) to ensure that all Statements and notifications are emailed to the Investor / Advisor’s correct email addresses. Ensuring that American Funds is in compliance with required regulations.
* Identifying trends and reviewing with Web team or Shareholder Services team / team managers. (Heartbleed; High impact issues such as logging in, printing, E-Sub, system down)
* Research and resolve escalated website issues submitted by Web Help Queue associates.

Business Acceptance Testing

* Testing info from the Interactive Worksheet & Tax Center pages on Adviser and Investor Website
* Testing tax form information and making sure it matches the information that we have on the account in SHARE.
* Tested on The American Funds College 2015 merging into the new College Enrollment Fund and also the TEFMD / TEFVA merging into TEBF.
* Tested on the rollouts of the new American Funds Strategic Bond, Emerging Markets Bond, and Corporate Bond Fund.
* Rollout of new American Funds Emerging Markets Bond and Corporate Bond Fund.
* Worked on the rollout of the new Digital Redemption Redesign for the Investor and Advisor Website. Also working on the testing for the new F2 / F3 share classes.

Business System Support (BSR)

* Working as a liaison between the business units and AFS (American Funds Services) Applications Team to discuss current system projects and trends.
* Researching system issues and enhancements reported by the end-user and/or provide the end-user with general technical support.
* Assists Project Coordinators and Web Representatives with testing of new projects and/or potential company rollouts

2002 – 2008 HSBC North America Carmel, IN

Collections

* Managed a Loss Mitigation queue of high risk first and second mortgages running up to 300 DOD. Assisted customers with solutions to keep them in their homes via reinstatements, loan modifications, and when necessary short sales and deed in lieu’s.
* Selected to work a large volume queue (200+) of delinquent high risk personal home loans ranging from 60 – 120 DOD. Worked to resolve delinquency by establishing contact with customers via skip tracing, payment resolution and hardship programs. When necessary, prepared files for possible legal workups, such as wage garnishment and foreclosure.
* Worked the front end dialer in low delinquency unsecured loans ranging from 0 – 30 DOD. Acted as team lead for management; taking escalated calls, pulling performance reports, and side by side coaching for new employees.

Unsecured and Mortgage Loans Sales

* Assisted local branch offices by soliciting and closing on new loans using provided leads. Established rapport and helped customers determine the best solution for their financial situations.
* Responsible for direct mail leads issued to new and/or existing customers. When appropriate, determined the customer’s opportunity for a possible up sell.

1999 – 2002 Cash America Pawn Indianapolis, IN

Pawn Associate / Sales

* Issued loans to Cash America customers. Verified quality and value of merchandise used as collateral, worked-out repayment terms of contracts. Also responsible for sales of merchandise in the store.
* Created payday loans for customers: verified employment, reviewed terms of contract, and followed up on loan repayment. Assisted management with bank deposits, balancing of cash drawers, and relief management.

**Education­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* Broad Ripple High School; Indianapolis, IN 1998
* HSBC Peak University Bachelor’s Degree 2004
* Amazing Race – HSBC Management Training 2004