

# Candidate 4012

## **Energetic and outgoing**

WA

**BANKING/FINANCIAL: INSURANCE: LEGAL PROCESSES:**

Experienced professional working in a fast-paced environment demanding strong organizational, technical, and interpersonal skills. Highly trustworthy, ethical and discreet; committed to superior customer service. Confident and poised in interactions with individuals at all levels. Detail-oriented and resourceful in completing projects; able to multi-task effectively.

**Relationship Management:** Adept at building lasting, mutually beneficial client relationships based on respect, trust, and responsiveness service. Experienced managing multiple upper level management personnel at the same time.

**Product Knowledge:** Skilled at identifying products and services that will help clients achieve their goals.

**Accounting and Financial Analysis:** Many years of experience with accounting concepts, systems, and financial analysis. Cash management experience through banking concepts and technology. Strategic

**Leadership/Sales:** Proven ability to contribute to the bottom line by developing new business, collaborating effectively with internal and external partners, and identifying opportunities for process improvements.

Legal Documentation Preparation

Insurance Knowledge

Cash Management

Investments

## Work Experience

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### **Sales Representative**

State Farm

April 2022 to Present

### **Certified Personal Trainer**

Fitness -WA

December 2021 to January 2022

I just competed in bodybuilding for the first time in June. I have a thorough understanding of nutrition and workout plans.

### **Core Role: Insurance Sales**

Allstate Insurance -WA

January 2016 to November 2021

- Meet with clients to determine insurance needs.
- Process payments.
- Run quotes to determine competitiveness
- Resolve issues.

- Research insurance laws for correct processes.

### **Core Role: Security System Sales**

ADT Security - WA

January 2015 to December 2016

- Meet with clients to determine security needs.
- Gather pertinent information to provide an accurate proposal for the client.
- Network with clients and/or business owners.
- Cold call potential clients.
- Provide a wide array of customer service needs.
- Oversee installation of new burglar or camera systems.
- Work as a team with our installation, residential, and custom home crew.

### **Core Role: Resource Specialist**

Law Firm - WA January 2012 to December 2013

- Met with clients to determine Medicaid qualification.
- Collected financial data from many sources and analyzed it.
- Entered financial data into worksheets.
- Maintained and completed legal documents.
- Assisted clients in completing Medicaid applications.
- Investigated property, mineral, and other property rights.
- Worked with DSHS in getting Medicaid applications approved.

### **Core Role: Financial Advisor**

Wealth Management -WA January 2007 to  
December 2008

- Consulted with clients to determine their long-term financial goals.
- Evaluate a client's tolerance for risk and build a portfolio accordingly.
- Provide ongoing advice to existing clients.
- Developed new business by identifying and pursuing potential clients.
- Researching stock, bonds and mutual funds.
- Explain and sell a multitude of products including insurance and annuity products.
- Maintained education requirements.

### **Core Role: Financial Advisor**

Investments - WA January 2006 to December  
2007

- Completed an intensive training program.
- Door knocked to obtain clients.
- Consulted with clients to determine their long-term financial goals.
- Evaluate a client's tolerance for risk and build a portfolio accordingly.
- Provide ongoing advice to existing clients.
- Developed new business by identifying and pursuing potential clients.
- Researching stock, bonds and mutual funds.
- Explain and sell a multitude of products including insurance and annuity products.
- Maintained education requirements.

## **Core Role: Service Office and AVP**

KeyBank - WA

January 1999 to December 2006

- Managed relationships with commercial banking customers.
- Oversaw successful utilization and cross-selling of all bank products.
- Recognized and developed opportunities for process improvements.
- Maintained integrity of client information systems.
- Drove the loan closing process which included; ordering and reviewing loan documents.
- Made sure the loan documents conformed to the credit approval policies.
- Collaborated with internal and external partners to secure timely and accurate funding of loan transactions.
- Proactively identified and resolved documentation issues effecting client services and risk management.
- Executed new-client set-up.
- Facilitated resolution of customer service issues.
- Monitored past-due payments and determined the appropriate course of action.
- Reconciled the General Ledger Accounts, as well as other banking systems and reports.
- Assisted with implementing Cash Management products.
- Worked with product partners to resolve client issues and/or questions.
- Assisted Five Vice Presidents
- Maintained and prepared spreadsheets, flow charts and various presentations.

## **Sales**

State Farm

April 2022

Sales

Payment processing

Research

## **Education**

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### **Certificate in Personal Training**

Issa

## **Skills**

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- Analytical/Financial/Systems: Value-Added Leadership:  
Problem Solving Able to clarify purpose and follow logical sequence.  
General Accounting Well-earned reputation for professional integrity.  
Computer Operations Consistent record of developing long lasting clients.  
Word, Excel, Power Point, Outlook Team Building & Mentoring  
Account Receivable/Payable  
Becoming an Officer and Assistant Vice President of KeyBank.  
Receiving two customer service awards for KeyBank.
- General Ledger Accounting
- General Ledger Reconciliation
- Financial Report Writing
- Financial Analysis

- Journal Entries
- Bank Reconciliation
- Insurance Sales
- Account Reconciliation
- Office Management
- Financial Statement Preparation
- Auditing
- Payroll
- Balance Sheet Reconciliation

## Links

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## Certifications and Licenses

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**Insurance Producer License**

**AED Certification**

**Certified Notary Public**

**Property & Casualty License**