Client Analyst

ROBERT SMITH

Phone: (123) 456 78 99
Email: info@qwikresume.com
Website: www.qwikresume.com
LinkedIn: linkedin.com/qwikresume
Address: 1737 Marshville Road, Alabama

Objective

Results-oriented, high-energy, hands-on Client Analyst professional, with a successful record of employment within process management at a financial organization. Possess the ability to learn new concepts quickly, excellent customer support background and function well in a team environment. With the ability to prioritize and remain focused, my goal is to provide a company with quality employment while learning new procedures.

Skills

Customer Service, Retail Management, Retail Sales, Management, Microsoft Office, Retail, Computer Literate, Detail Oriented.

Work Experience

Client Analyst

ABC Corporation - June 2012 – 2014

- Centralized point of contact on all foreign exchange related issues including analysis, transaction investigations, and internal ad hoc requests.
- Responded to telephone and email inquiries from clients and corporate and regional office staff, relating to failed or delayed transactions, specializing in the support of corporate clients in North America.
- Kept update knowledge of the latest regulations and resolve compliance related concerns including PEP, KYC, and Sanctions related payment issues.
- Ensured repair of payment transaction instructions and when necessary, spoke to clients and sales executives to obtain or provide further information.
- Coordinated between internal departments to ensure a case and/or investigation is resolved.
- Communicate directly with financial institutions U.S and Canadian clients via phone and email.
- Co-project managed client-facing business intelligence solution.

Client Analyst

Delta Corporation - 2008 – 2012

- Collaborated with the client management team to lead key client process improvement initiatives Communicated effectively across company departments IT.
- Data and invoice entry, invoice assistant training, operating a multi-line switchboard.
- Scanning, validating, consolidating to various invoice groups Providing detailed information to ensure accuracy of inputting live orders, invoices .
- Providing direct customer service across the healthcare industry practices, insurance/billing agencies, and patients Revenue Cycle Management.
- Led the coordination of Global Technology Central reporting of the EU1.2bn to change the bank book of work Executive and Regulatory reviews Provided.
- Supervisor Julius Nyanda Contact No. (415) [] Functions Analysis of clients income and their financial situation, Budgeting, Gathering information .
- Part of 4-member team supporting and managing over 250 accounts for high-net worth individuals, families, and institutions whose combined assets .

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Education

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