ROBERT SMITH

Client Service Representative II

Phone: (0123)-456-789 | Email: info@qwikresume.com | Website: Qwikresume.com

SUMMARY

Proven experience and ability to balance conflicting demands, prioritize and execute. Strong verbal and analytical skills required to evaluate complex documents and translate them to understandable concepts for broad audiences. Ability to evaluate complex rules &regulations, assess impact on operations and develop operating plans and strategies, communicate and execute changes in a dynamic operating environment.

CORE COMPETENCIES

Microsoft Office, Cash Handling, Clerikal Duties, Scheduling.

PROFESSIONAL EXPERIENCE

Client Service Representative II

ABC Corporation - 2009 – November 2013

Key Deliverables:

- Communicate directly with clients and their personal advisors on plan administration, including technical and regulatory issues.
- Establish and build ongoing relationships by maintaining confidentiality confidentially coordinate with clients.
- Participants to ensure all requests are processed within the plan & IRS regulations researching and resolving complex issues relating to plan operations and documents.
- Providing on-going plan administration and ensuring compliance with governmental regulations and laws.
- Consult directly with plan participants regarding loans, distributions and related tax consequences of distribution requests.
- Monitor retirement plan transaction and perform plan administration services and record keeping duties necessary to report transactions and comply with regulatory reporting for all clients assigned.
- Responsible for setting the position, cash, margins, and collateral for domestic and foreign accounts for institutional clients of global exchange markets.

Lead Attendance Clerk

ABC Corporation - January 2007 – January 2008

Key Deliverables:

- Courtesy calls to parents, attendance history, parent letters, passes to students, etc.) for the purpose of resolving problems and coordinating activities and processes.
- Maintain a variety of attendance records, schedules, and files (manual and computer) for the purpose of documenting activities and/or providing reliable information internally and on a district level.

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- Processes documents and materials for the purpose of disseminating information to appropriate parties.
- Notify parents and/or guardians of student absences for the purpose of meeting county, state and federal requirements.
- Obtain attendance records for student entry and exit from campus during school hours ensuring accurate reporting of excused absences and truancies.
- Research discrepancies of attendance information and/or documentation for the purpose of ensuring the accuracy of attendance data before processing.
- Staff, parents, probation officers, other schools, and/or students, etc.) for the purpose of providing information and/or directions as may be required.

EDUCATION

Diploma - 1993(Barbara Jordan High School For Careers - Houston, TX)High School Diploma - (Pendleton Heights High School - Pendleton, IN)

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