



WILLIAM PEREZ

Junior Commercial Loan Specialist

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PROFESSIONAL SUMMARY

Ambitious finance professional with 5 years of experience in commercial loan analysis and processing. Skilled in evaluating loan applications, ensuring compliance with regulations, and enhancing client relations. Proven ability to improve operational efficiency and customer satisfaction in fast-paced environments. Ready to apply my expertise in loan underwriting to support a thriving financial team.

WORK EXPERIENCE

Junior Commercial Loan Specialist

📅 Apr / 2022-Ongoing

Quantum Solutions LLC

📍 Phoenix, AZ

1. Reviewed financial statements of bank-serviced loans to identify trends and assess financial conditions.
2. Interpreted complex financial documents to provide insights and recommendations for loan eligibility.
3. Evaluated loan applications and financial records to determine applicant creditworthiness and eligibility.
4. Prepared comprehensive reports for loan officers summarizing loan requests and recommendations.
5. Responded to inquiries from banks and borrowers regarding payments, interest rates, and loan terms.
6. Processed purchase requests and composed transaction records for loan approvals.
7. Managed case file transfers and prepared reports for effective loan liquidation.

Commercial Loan Specialist

📅 Apr / 2020-Apr / 2022

Lakeside Apparel Co

📍 Chicago, IL

1. Created tailored loan documentation for both personal and commercial loan clients.
2. Executed daily funds transfers for commercial lines of credit, ensuring accuracy and compliance.
3. Closed loans with clients, clearly explaining documentation and terms.
4. Coordinated with lenders, insurance companies, and attorneys to finalize loan agreements.

EDUCATION

Bachelor of Business Administration

📅 Apr / 2018-Apr / 2020

University of Finance

📍 Portland, OR

Focused on finance and banking, with coursework in commercial lending and financial analysis.

SKILLS

Financial Analysis Software



Loan Documentation Management



Market Research



Financial Modeling



Negotiation Skills



INTERESTS

🎨 Art

🤝 Volunteering

🌲 Hiking

🧘 Yoga

STRENGTHS

🔍 Criticality

☰ Detail-oriented

🤝 Diplomacy

😊 Enthusiasm

LANGUAGES



English



Mandarin



Swahili

ACHIEVEMENTS

★ Successfully processed over 200 commercial loan applications, achieving a 95% approval rate.

★ Reduced loan processing time by 30% through streamlined documentation procedures.