



WILLIAM PEREZ

Junior Credit Counselor

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PROFESSIONAL SUMMARY

Dynamic and results-oriented Junior Credit Counselor with 5 years of experience guiding clients toward financial stability. Expertise in creating tailored financial plans, facilitating workshops, and providing debt management solutions. Passionate about enhancing financial literacy and empowering individuals to achieve their financial goals.

WORK EXPERIENCE

Junior Credit Counselor

Pineapple Enterprises

📅 Apr / 2021-Ongoing

📍 Santa Monica, CA

1. Facilitated financial planning workshops and provided one-on-one counseling to empower transitioning Soldiers and Family Members.
2. Educated clients on banking, debt management, budgeting, and credit usage to enhance financial readiness.
3. Conducted interactive workshops for groups of up to 50 attendees, ensuring effective communication of complex financial concepts.
4. Prepared detailed monthly reports to track attendance and engagement in financial counseling activities.
5. Collaborated with financial workgroups to enhance service delivery and support client needs.
6. Managed client communications regarding eligibility for services and compliance with program requirements.
7. Ensured compliance with federal regulations while safeguarding sensitive client information.

Credit Counselor

Summit Peak Industries

📅 Apr / 2020-Apr / 2021

📍 Denver, CO

1. Managed inbound and outbound calls to assist clients with late payments and financial inquiries.
2. Utilized CRM software to update client information and track payment histories effectively.
3. Analyzed clients' financial situations to determine eligibility for various loan options and repayment plans.
4. Developed customized budgets with clients to facilitate their debt management processes.

EDUCATION

Bachelor of Science in Finance

University of Financial Studies

📅 Apr / 2019-Apr / 2020

📍 Denver, CO

Focused on financial management, personal finance, and investment strategies.

SKILLS

Financial Analysis



Credit Evaluation



Budgeting Techniques



Regulatory Knowledge



Loan Processing



INTERESTS

🎨 Art

🤝 Volunteering

🌲 Hiking

🧘 Yoga

STRENGTHS

🔍 Criticality

☰ Detail-oriented

🤝 Diplomacy

😊 Enthusiasm

LANGUAGES



English



Swahili



Spanish

ACHIEVEMENTS

★ Conducted over 30 financial planning workshops, enhancing financial literacy among 150+ clients.

★ Developed customized debt management plans, resulting in a 25% reduction in client debt within 6 months.