Robert Smith

Customer Service Administrator

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SUMMARY

5+ years of experience as a Customer Service Administrator is looking to broaden my knowledge of business management, sales, and marketing while seeking opportunities to grow professionally with a company that offers a high-quality service or product and moves into progressively more responsible management positions.

SKILLS

Office Administration, MS Office, Billing, Data Entry, Customer Service, Filing, Clerical, Receptionist, As400, Account Management, Billing, Customer Service Experience, And Office Management.

WORK EXPERIENCE

Customer Service Administrator

Mea Wealth Advisors - April 2017 – Present

- In charge of managing clients income from their retirement accounts, and/or other accounts invested in the stock market.
- Handle all account-related paperwork, as well as prepare current positions reports for financial advisor meetings.
- Managing client accounts based on each individual’s financial goals and specific planning outline, making room for trades when necessary.
- Working closely with other asset management companies regarding accounts held by our clients at these branches.
- Answering calls from, and sometimes make calls to, clients regarding their Roth, 401(k), 403(b), UTMA/UGMA, trust, individual, and joint accounts.
- Create lasting, genuine relationships with clients, future clients, business partners, and other asset management companies in order to gain and maximize knowledge of the business.
- Perform operational and administrative activities for the assigned regional sales manager.

Support Center Coordinator

Robeks Corporation - August 2013 – May 2017

- Maintain a list of key contact individuals for all vendors and distributors.
- Monitor, track and analyze vendor and distributor performance, as well as maintain copies of current order guides and price lists.
- Provide support to marketing/operations on new product implementation and procurement.
- Utilize procurement and vendor approval policies and procedures to improve the supply chain.
- Provide periodic reports to analyze purchasing volume and usage of various products.
- Maintain and update the food cost model with correct pricing and products.
- Greet all office guests upon arrival and direct guests to appropriate individuals or departments.

EDUCATION

AA in Creative Writing - 2010 to 2012(Santa Monica Community College - Santa Monica, CA)

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