



BENJAMIN LEE

Financial Counselor

✉ support@qwikresume.com
☎ (123) 456 7899
📍 Los Angeles
🌐 www.qwikresume.com

PROFESSIONAL SUMMARY

Dynamic Financial Counselor with two years of experience in delivering personalized financial education and strategic advice. Proficient in assessing clients' financial needs and creating actionable plans to enhance their financial wellness. Committed to fostering financial literacy and empowering clients to make informed decisions for a secure financial future.

WORK EXPERIENCE

Financial Counselor

Maple Leaf Consulting

📅 Feb / 2024-Ongoing

📍 Toronto, ON

1. Delivered comprehensive financial counseling, enhancing clients' understanding of credit and personal finance.
2. Acknowledged as 'Counselor of the Month' for exceeding client engagement targets.
3. Conducted one-on-one assessments to tailor financial strategies to individual client needs.
4. Followed up with clients to ensure implementation of recommended financial actions.
5. Developed customized financial plans, supporting clients in reaching their financial objectives.
6. Maintained high-quality service evaluations to ensure client satisfaction with debt management programs.
7. Provided exceptional customer service, assisting clients in understanding creditor policies effectively.

Financial Counselor

Silver Lake Enterprises

📅 Feb / 2023-Feb / 2024

📍 Seattle, WA

1. Facilitated financial counseling sessions via phone, focusing on personalized client service in a call center environment.
2. Consistently achieved 'exceeds expectations' ratings on Quality Assurance Reviews.
3. Served as a resource for fellow counselors at the counseling help desk, providing support as needed.
4. Trained and mentored new counselors to enhance team performance.
5. Regularly updated counseling materials to ensure accuracy and relevance.
6. Utilized customer service skills to address client inquiries effectively.

EDUCATION

Bachelor of Science in Finance

State University

📅 Feb / 2022-Feb / 2023

📍 Portland, OR

Studied financial principles, investment strategies, and personal finance management.

SKILLS

Retirement Planning

Budgeting And Forecasting

Tax Preparation

Debt Management Strategies

Client Communication

Financial Education

INTERESTS

🤿 Scuba Diving

🎮 E-sports

📖 Reading Fiction

🧩 Puzzle Solving

STRENGTHS

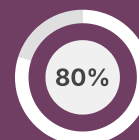
📋 Stewardship

👥 Teamwork

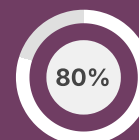
🔗 Tenacity

👁 Vision

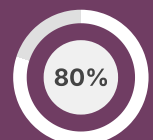
LANGUAGES



English



Arabic



Swahili

ACHIEVEMENTS

★ Facilitated financial workshops that improved client understanding of budgeting by 30%.

★ Developed personalized financial plans that led to a 25% increase in client satisfaction.