

ROBERT SMITH

Financial Executive

E-mail: info@qwikresumc.com

Phone: (0123)-456-789

SUMMARY

Seeking a position as a Financial Executive with a large established Insurance company with an emphasis on business development and excellent customer care for high net worth clients that will benefit from my insightful knowledge and strong experience in client relationship building and superior work ethic.

SKILLS

Microsoft Office, Adobe Photoshop, Adobe Reader.

WORK EXPERIENCE

Financial Executive

ABC Corporation - February 2014 – 2021

- Audited community receipts and project work orders, finalize and route grant documents for department review.
- Scanned and mailed finalized documents for community signatures, maintain project files, close out 2 year grants.
- Maintained National Parks Service (NPS) project website to comply with Federal funding requirements.
- Prepared Annual Reports for Historic Preservation Fund Grants and Missouri Heritage Properties Grants Program.
- Prepared / routed Grant application to NPS for department review.
- Logged / Scored track grant applications during review process.
- Coordinated "deliverables" and milestone schedule with Grant Monitors and Grant Manager.

Financial Executive

Delta Corporation - 2014 – 2014

- Duties Included Handling sensitive information in financial accounts.
- Engaging in the purchase and trade of stocks and bonds.
- Obtaining quarterly financial goas regarding the status of liquid assets.
- Assigned in Metrobank Plaza Independencia Branch Discussed to Metrobank Clients the Financial Services offered that are beneficial to them including.
- Provide quality service to clients needs that will secure their family in the future Stationed Metrobank Plaza Independencia branch and works hand-.
- Entertain and accommodate existing clients with their concerns and queries with regards to their policy.
- Registered Representative and Inside Rep Insurance Wholesaler Marketing, Sales Northbrook Life/Allstate sales training, specialty the immediate, and .

SCHOLASTICS

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