

# Robert Smith

## Financial Sales Consultant

### **CONTACT DETAILS**

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### **PERSONAL STATEMENT**

Accomplished Financial Sales Consultant with 8 plus years of experience with a proven ability to manage personnel and budgets that support business and financial objectives. Have led key initiatives to substantially reduce operating costs and increase revenues to move the company from last to first place in the assigned market. A recognized expert in applying financial concepts to asset management decisions.

### **SKILLS**

Administration Training & Development, Sales, Marketing, Process Improvement, Credit, Underwriting, Customer Service, Project Management, Financial Analysis, Team Building, Mentoring, Coaching, Microsoft Office.

### **WORK EXPERIENCE**

#### **Financial Sales Consultant Independent - 2011 - Present**

##### *Responsibilities:*

- Responsible for identification of state and national retail originators using wholesale funding conduits.
- Structuring and implementing the quarterly/annual business plans to meet production goals.
- Monitoring the account legal compliance and educated on loan programs to achieve target funding ratios.
- Developing and maintaining the extensive database for communicating, marketing, tracking and training of accounts.
- Clients include Ally Bank, Bank of America, Peoples Bank, and Walker Jackson.
- Responsible for opening eastern nc market for the educational fund-raising company.
- Establishing several new accounts in a county territory.

### **LANGUAGES**

English (Native)  
French (Professional)  
Spanish (Professional)

#### **Financial Sales Consultant ABC Corp - 2010 - 2011**

##### *Responsibilities:*

- Maintained the government regulated compliance pertaining to the application processes for mortgages, loans, lines of credit, credit cards, checking savings accounts.
- Identified customers financial needs and recommend products and services to meet those needs.
- Excellent at recognizing and preventing fraud at the new account process and teller line.
- Developed relationships with internal business partners and referred clients to them as appropriate.
- Processed client transaction at the teller line, operated vault, ordered branch cash and weekly settlement of the ATM.
- Met with clients/potential clients to have in-depth conversations about their financial needs and concerns so that I could present them with the proper financial solutions.
- Instructed the newly hired team members on bank processes and the functions of bank computer systems.

### **INTERESTS**

Climbing  
Snowboarding  
Cooking  
Reading

### **REFERENCES**

Reference - 1 (Company Name)  
Reference - 2 (Company Name)

## **Education**

Business Management - 2009 (North Carolina State University -  
Raleigh, NC )MBA - (School Of Mortgage Banking - Houston, TX )