

# Robert Smith

## *Asst. Financial Services Consultant*

### PERSONAL STATEMENT

A highly capable professional with solid experience within the field of higher education. Quality-driven with an impeccable work ethic and recognized success devising innovative planning strategies. Consistently adhere to and comply with all applicable policies, procedures and regulations.

### WORK EXPERIENCE

#### ***Asst. Financial Services Consultant*** **ABC Corporation - 2001 - 2002**

##### *Responsibilities:*

- Administered account and plan information to clients, internal field agents, and external finance companies.
- Reviewed and analyzed participants quarterly financial statements to consult them on account gains-losses.
- Assisted clients with unforeseeable emergency withdrawals by processing applications over the telephone.
- Responsible for identifying the clients needs and employing sales techniques for increasing referrals to partners.
- Consulted participants on annuity payoff withdrawal options at retirement or termination of employment.
- Educated customers on the basis of document completion, investments, retirement, and tax legislation.
- Processed fund exchanges and investment allocation transactions for existing and future contributions.

#### ***Financial Services Consultant*** **TIAA-CREF - 1998 - 2001**

##### *Responsibilities:*

- For 24 top-tier institutions (Cornell University, Boston Medical Center, University of Pittsburgh, etc), responsible for communicating details of employer-sponsored retirement plans to current and former employees including defined benefit, defined contribution,.
- For all retirement plans, provide financial guidance and assistance related to enrollment, contributions, loans, cash withdrawals, ERISA, hardship withdrawals, IRS considerations, required minimum distributions, rollovers, and direct transfers; research and troubleshoot all processing errors.
- Consult with clients in creating an individual long-term retirement plan strategy including asset allocation, portfolio diversification, asset accumulation, and tax considerations.
- On track to exceed annual Key Performance Indicators; promoted in July 2015 to EAS premier institution team.
- Licenses held Series 6, Series 63, and General Lines Insurance Agent - Life, Accident, Health, & HMO.
- Volunteer Council Member and "CREF Links"; New Hire Program Mentor..

### **CONTACT DETAILS**

1737 Marshville Road,  
Alabama  
(123)-456-7899  
info@qwikresume.com  
[www.qwikresume.com](http://www.qwikresume.com)

### **SKILLS**

Microsoft Office, Apple Computers, Unity, Google Docs, Maya.

### **LANGUAGES**

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

### **INTERESTS**

Climbing  
Snowboarding  
Cooking  
Reading

### **REFERENCES**

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

- This is Dummy Description data, Replace with job description relevant to your current role.

## **Education**