

MIA TAYLOR

Transfer Agent

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PROFESSIONAL SUMMARY

Detail-oriented Transfer Agent with over 5 years of experience in managing shareholder records, processing transactions, and ensuring compliance with regulatory requirements. Proven ability to enhance client satisfaction through effective communication and problem-solving skills. Adept at utilizing technology to streamline operations and improve efficiency in transfer processes.

WORK EXPERIENCE

Transfer Agent
Blue Sky Innovations
Apr / 2022-Ongoing
Chicago, IL

- Executed client transfer requests while ensuring compliance with industry regulations.
- Prepared documentation for regulatory audits and examinations.
- Maintained accurate records of all transfer activities to support compliance audits.
- Monitored client accounts to ensure timely processing of transfers and payments.
- Utilized various tracking tools to enhance the accuracy of client information.
- Provided training to new staff on best practices for client interactions and transfer processes.
- Reviewed and updated internal procedures to align with regulatory changes.

Transfer Agent
Lakeside Apparel Co
Apr / 2020-Apr / 2022
Chicago, IL

- Managed inbound and outbound calls to assist clients with transfer inquiries and requests.
- Ensured accurate data entry for client accounts and transfer documentation.
- Collaborated with admissions representatives to facilitate student transfers and program information.
- Researched and addressed client inquiries regarding compliance and regulatory policies.
- Processed client updates and verified information to maintain accurate records.

EDUCATION

Bachelor of Science in Finance
University of Missouri
Apr / 2018-Apr / 2020
Phoenix, AZ

Studied financial principles, investment strategies, and regulatory compliance.

SKILLS

- Client Account Management
- Accurate Data Processing
- Client Relations Management
- Financial Transaction Processing
- Risk Management

INTERESTS

- Home Brewing
- Wildlife Conservation
- Running
- Public Speaking

STRENGTHS

- Willingness
- Wisdom
- Zeal
- Ingenuity

LANGUAGES

- English
- French
- Japanese

ACHIEVEMENTS

- Achieved a 95% accuracy rate in client data management, enhancing the reliability of records.
- Streamlined transfer processes, reducing average processing time by 20%.