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J.W. Jobseeker

Objective

A challenging position that will utilize acquired **Management, Sales** and **Customer Service** expertise and experience.

Qualifications

- **More than 5 years** of experience in various investment, banking and retail sales environments.
- **Expertise** in risk management, funds processing, multi-store supervision, and banking services.
- **Experienced** in staffing, inventory control, strategic planning, promotions and workflow streamlining.
- **Proven ability** to work effectively in both independent and team situations with positive results.
- **Proficient** in the use of MS Word, Windows, Excel, Lotus, Beta and Paradox computer applications.
- **Excellent** communication, interpersonal, research/analysis, organization and leadership skills.
- **Quick learner** able to grasp new ideas, concepts and methods.
- **Energetic** and self-motivated team player/builder. Ambitious and flexible with an ability to adapt to changing environments.

Employment Experience

Charles Schwab & Company, Inc. – Big City, NY

Mutual Funds / Client Service Specialist, 10/97-Present

Currently spearheading a risk management project for an online discount brokerage firm. Serve as liaison between two departments and multiple fund companies. Process millions of dollars in daily wire fund transfers, compile statistical spreadsheet analyses, e-mail teams with daily fund totals, and interface with team members to resolve issues. Prioritize and streamline workflow, train/coach team members and research solutions. Execute processes to better service clients and fund companies.

First Data Investor Services Group – Goodplace, FL

Investor Service Representative, 5/97-9/97

Represented a full-service, mutual fund transfer agency serving major, nationwide corporations. Interfaced with mutual fund companies and brokers to verify/ensure accuracy of processed transactions and collections. Complied with deadlines, and ensured efficient processing of deposits and payments.

Safety Fund National Bank – Badplace, TN

Regional Teller, 10/96-5/97

Assisted customers with processing various banking transactions. Provided bank operations and service information for branch locations throughout the North-Central Region.

Dress Barn – Slowsville, MT

Assistant Manager, 8/95-10/96

Employed by a formal/casual women's apparel company with 700+ nationwide stores. Managed store operations throughout the metropolitan Boston area and Southern New Hampshire. Directed sales/marketing, inventory control, staffing and customer relations functions. Initiated and implemented innovative promotional strategies resulting in significant increase in sales revenues. Consistently exceeded goals.

Education

University of New Achievements – Guess Where, USA

Bachelor of Arts in Communications

Minor: English • 8/91-5/95 • GPA: 3.25

Other Coursework: Media Graphics and Adobe PhotoShop