

JANE DOE

5555 Any Street ♦ Irving, TX 12345 ♦ (555) 555-5555 H ♦ (888) 555-5555 C ♦ jane.doe@gmail.com

FINANCE ADVISOR/NEW EMPLOYEE TRAINER

AREAS OF EMPHASIS – SALES, ACCOUNTING, FINANCIAL SERVICES

MBA graduate and Finance Advisor with 15 years of experience working in finance and customer service positions in the banking, education, and food service industries. Extensive experience working directly with students and customers, providing financial advice, analyzing financial data, determining financial aid eligibility, and using various computer systems to generate reports. Diverse background includes multiple customer service and sales-oriented positions within the education and financial services industries. Strong accounting background. Dedicated leader with outstanding communication, analytical, organizational, and problem-solving skills.

Areas of Expertise

Financial Advising | Customer Service | Employee Training | Accounting | Analyzing Data
Accounting (Adjustments, AR/AP, Billing) | Financial Forecasting | Problem Solving | Creating Reports

EDUCATION

University of Phoenix, Phoenix, AZ Master's Degree in Business Administration	2011
University of Phoenix, Phoenix, AZ Bachelor's Degree in Business Management	2009

ABC Company, Irving, TX **January 2013 – Present**
Online Marketing Sales Agent

- Coordinate marketing efforts with strategic plans and objectives.
- Prospect and develop new business over the phone with new and existing customers who have created job profiles online using search engines.
- Pitch ideas for customized marketing campaigns for colleges, including Kaplan, ITT, and Strayer University.
- Assist with the creation of college proposals and presentations for potential students.
- Enter, maintain, and track student data, including education qualifications, graduate date, and college degree credits.

ABC Company, Plano, TX **August 2012 – December 2012**
CASS Coordinator/Billing Coordinator (contract position through Gould Staffing)

- Managed billing invoice preparation for multiple food programs on a weekly and monthly basis to prepare for audits; performed adjustments to incorrect invoices.
- Worked closely with team members to ensure work was completed for upcoming audits and to ensure all bills were entered for month-end reports.
- Prepared itemized invoices and recorded amounts due for products purchased.
- Prepared detailed and itemized invoices for vendor purchases.
- Willingly worked 45 to 60 hour workweeks to keep up with high-volume workload.
- **Maintained a 95% billing accuracy on weekly audits.**
- **Maintained 100% division vendor satisfaction rate by solving billing issues in a timely manner.**

ABC Company, Arlington, TX

February 2012 – April 2012

Leasing Agent/Administrative Assistant

- Collaborated with property manager to complete daily operational goals; collected rent payments, followed up with maintenance regarding unit repairs, and set and tracked goals for monthly unit sales.
- Collected and posted payments, billing, and move-in/move-out deposits for month-end financial reports.
- Created lease documents, scheduled vendor visits, and conducted market surveys.
- Led unit tours for potential residents.
- Ensured residents and potential new residents received exceptional customer service.

ABC Company, Dallas, TX

2000 – 2002, December 2011

Senior Member Service Consultant

- Managed and supported tellers and the lobby of the credit union.
- Trained and mentored tellers regarding financial decisions, including counterfeit money, how to avoid and/or handle transaction errors, and how to perform consultative, suggestive-selling techniques.
- Ordered cash and supplies for branch and maintained inventory supplies on a weekly basis.
- Met and collaborated with Branch Manager weekly to discuss branch goals and strategies.

ABC Company, Plano, TX

October 2006 – August 2011

Finance Advisor/New Employee Trainer

- Met and educated military students to understand and document their financial funds.
 - **Managed a personal portfolio of 350 students that generated \$110K in sales revenue per month.**
 - Advised students about methods to pay for their education, financial aid eligibility, application procedures, financial assistance programs, costs, indebtedness, money management, and financial planning.
 - Created individualized information catered to the particular needs and situation of the student.
 - Interfaced with students and lenders, employers, and Student Services staff to resolve issues.
 - Prepared and submitted weekly and monthly reports and forecasts reflecting cost analysis.
 - **Trained, coached, and mentored new employees; achieved an 82% retention rate for new employees.**
 - **Maintained a customer service availability rate of 95% for 2 consecutive years with an average talk time of 6 hours per day.**
 - **Recovered \$67K within 60 days based on re-entry students with balances owed.**
 - **Received “Exceeds” rating for performance every 6 months on performance evaluation.**
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PROFESSIONAL AFFILIATIONS

Church of Latter-day Saints – Primary Teacher, Children 4-5 years old
International Toastmasters – Vice President of Education, Treasurer, Secretary, and Club Mentor

COMPUTER SKILLS

PeopleSoft, Oracle Financials, Teller Navigation, Osirius, Campus Tracking, SIS (Supplier Incentive System), PIM (Product Information Management) ASYS, Microsoft Word, Outlook, and Power Point