

NAME GOES HERE
Street Address, City, ST zip
Home Telephone (415) 123-4567
email@domain.ext

SUMMARY

summarize
your most
important skills.

- Financial services professional experienced in project management and operations
- NASD Licenses: Series 7, Series 63
- SOAR (Schwab Operations Award and Recognition) Award Winner Q2 2004
- Proficient in Microsoft Excel, Word, PowerPoint, Outlook, Project
- Exceptional customer service skills developed through training with a leading hotel company
- Personal work characteristics include: analytical, organized, professional, empathetic, and thorough

list software you know

your strongest
qualities

WORK EXPERIENCE

Charles Schwab & Co., Inc., San Francisco, CA

2000-Present

Senior Operations Specialist / Project Manager

- Executed hundreds of stock, bond, and mutual fund trades daily with virtually no trade errors.
- Improved inefficiencies in procedures by eliminating duplication and unnecessary work.
- Developed system enhancements and automated processes resulting in a 400% increase in productivity for the department. Helped develop the client database for the Schwab Fund for Charitable Giving.
- Co-authored the department's procedural guidelines manual. Trained new employees.
- Processed accounts, including opening and funding new accounts and servicing existing ones.
- Researched and resolved problems and client concerns quickly and professionally.
- Led and supported project teams in Account Operations. Orchestrated the business requirements gathering process, effectively communicated information between the business and technical teams, developed project plans, executed projects on-time with allocated budget and resources, resolved issues and problems as they arose, and led meetings with a strong voice.
- Managed the 'help' email box for one of Schwab's critical client databases. Communicated with users and the technical team to resolve issues quickly.

include HOW you
achieved something

Providian Financial Corp., San Francisco, CA

1999-2000

Funding Representative – Institutional CD Investments

- Developed relationships with representatives from brokerage firms, banks, credit unions, and companies, increasing deposits by 33% and retaining 86% of existing accounts from 1999-2000.
- Opened and funded new accounts, serviced existing accounts, and processed wire transfers.
- Streamlined department procedures by reducing paperwork and duplicated processes. Resulted in lower labor and materials costs.
- Assisted the Retail CD Investments group when their call volumes and work escalated.

quantify
if you can

Federal Express Corp., South San Francisco, CA

1998-1998

Courier

- Delivered and picked up time sensitive domestic and international shipments, calculated and processed payments, and met daily package quotas.
- Increased FedEx customer base by an average of five to ten new accounts per month through direct solicitation and referrals to the sales department.

EDUCATION

San Diego State University, San Diego, CA

B.A., Geography, Emphasis in Urban and Regional Analysis

University of California Berkeley Extension, Berkeley, CA

Professional Certificate in Project Management (expected completion summer 2005)