
Brokerage Clerk Resume

Job Objective

To obtain a Brokerage Clerk position that will allow me to utilize my skills and has potential for growth.

Highlights of Qualifications:

- Extensive experience in financial service sales and marketing
 - Huge knowledge of word processing and financial spreadsheet programs
 - In-depth knowledge of mutual fund operational processes
 - Wide knowledge of Mutual Funds, transfer agency operations and trading
 - Proficient with MS Word, Excel, PowerPoint, and the Internet
 - Amazing ability to work autonomously
 - Superior communication and problem solving skills
 - Excellent interpersonal skills, administrative and time management skills
-

Professional Experience:

Brokerage Clerk
Tri-State Employment, Huntington, NY
August 2005 – Present

Responsibilities:

- Coordinated with customers and coworkers.
- Maintained security transactions and scheduled transfers and delivery of security certificates.
- Outlined forms and operated standard office machines.
- Reviewed daily stock prices.
- Calculated total holdings, dividends and interest and transfer taxes.
- Formulated reports and verified ownership and transaction information.

Brokerage Clerk
Wells Fargo, Huntington, NY
May 2000 – July 2005

Responsibilities:

- Interrogated aged debtors report and identified overdue balances.
 - Identifying the nature of items comprising overdue balances.
 - Coordinated with clients and brokers.
 - Handled trade related queries and coordinated with Brokerage Assistant and Primary Bankers.
 - Formulated aged debtors reports and presentation.
 - Drafted rates letters and distributed to clients.
-

Education:

Bachelor's Degree in Finance
Sarah Lawrence College, Bronxville, NY

[Build your Resume Now](#)