Client Advisor Resume

Job Objective

Looking for a position as a Client Advisor in order to grow and advance within the organization while also advancing the organization.

Summary of Qualifications:

- Strong experience in relationship management within the financial services industry
- Thorough Deposit and General Banking knowledge
- Extensive knowledge of all wealth management products and services
- Ability to provide credit solutions to clients
- Strong consultative sales skills and client service skills
- Ability to sell a wide range of products and services

Work Experience:

Client Advisor, August 2005 – Present
SunTrust Banks, Burr Ridge, IL

- Presented day-to-day client service by determining client needs.
- Provided the clients with exact information using appropriate resources.
- Collected the information from client related to risk management needs and evaluated best way to manage the client's risk.
- Interacted the clients' needs and binding instructions to carriers.
- Managed the client accounts receivables to make sure timely collection of premiums and payments to carriers.
- Ensured that all regulatory requirements are met and complied with all internal policies and procedures.

Client Advisor, May 2000 – July 2005
Marsh & McLennan Companies, Burr Ridge, IL

- Assisted in account services for client's existing accounts.
- Interacted with client to assess their risk management needs.
- Analyzed client's exposures and loss experience against current types of coverage.
- Interacted with the broking plan to clients, brokers and carriers, as appropriate.
- Received, negotiated and evaluated the quotes from the carrier and the broking center and presented a recommendation to client.
- Implemented and maintained a quality post-sales service plan.

Education:

Bachelor's Degree in Business Administration, Grove City College, Grove City, PA