
FINANCIAL SALES ASSISTANT RESUME

Objective:

To obtain the position of Financial Sales Assistant position.

Summary of Skills:

- Strong knowledge of investment operations, procedures, transfers and industry terminology
 - Superb sales skills with self motivation attitude, and strong work ethic.
 - Ability to handle routine tasks quickly and accurately with a very strong attention to detail
 - Wide knowledge of the financial institution's personal investment products
 - Strong team management skills
 - Comfortable interacting with a group of potential clients
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Work Experience:

Financial Sales Assistant
Mercer Advisors, Grand Rapids, MI
August 2005 to till date

- Processed new account applications and obtained necessary account documents.
- Prepared materials for client meetings and seminars.
- Worked closely with branch personnel on referrals, seminars and appointments.
- Assisted with making proposals and presentations.

Financial Sales Assistant
GunnAllen Financial, Grand Rapids, MI
May 2000 to July 2005

- Received and processes orders.
 - Researched sales leads.
 - Assisted customers and handled inquiries about products or services.
 - Prepared and distributed various sales reports.
 - Maintained files, scheduled appointments and made travel arrangements.
 - Maintained and managed existing database.
 - Processed all incoming business with follow-up to investment vendor.
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Education:

Associate Degree in Finance
University of Iowa, Iowa City, IA

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