
Financial Sales Consultant Resume

Job Objective

Seeking a position of Financial Sales Consultant position in a reputed organization where I can use all my knowledge and experience in a better way to benefit the organization.

Work Experience:

Financial Sales Consultant, August 2005 – Present
Transcend, Visalia, CA

- Opened new account, sold bank products and provided incomparable customer service.
- Achieved sales goals established by manager by direct selling and referred deposit, loan and investment products and services as required.
- Maximized sale of retail products to all customers.
- Developed customer relationships through cross-selling and up-selling.
- Contacted potential customers to generate high revenues.

Financial Sales Consultant, May 2000 – July 2005
Kingston, Inc., Visalia, CA

- Performed account maintenance such as to add or change account set up, to add joint owners, to close accounts.
 - Provided advice to stockbrokers and other individuals who were attempting to sell securities.
 - Examined financial statements, and evaluated investment opportunities.
 - Provided advice to clients about possible investment opportunities.
 - Analyzed and determined best advice and product approach for customer contact situations.
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Summary of Qualifications:

- Extensive knowledge of financial services product
 - In-depth knowledge of loan and investment services
 - Ability to cross-sell products and services
 - Amazing ability to identify customer needs and implement effective solution
 - Excellent interpersonal skills and professional approach
 - Basic computer skills and excellent oral and written skills
 - Strong written and verbal communication skills
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Education:

Bachelor's Degree in Business Administration, East Los Angeles College, Monterey Park, CA
Master of Business Administration, Northern Kentucky University, Kentucky, KY

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