
Financial Sales Representative Resume

Job Objective

I would appreciate the opportunity to work for your company by filling the Financial Sales Representative position and putting my past experience to good use.

Highlights of Qualifications:

- Huge financial services sales experience
 - Wide knowledge of most common banking products and services
 - Ability to write routine reports and correspondence
 - Ability to cross-sell banking services to existing and potential clients
 - Ability to follow new account policies and procedures
 - Ability to resolve customer concerns
 - Highly articulate, consultative and confident in sales approach
 - Strong networking and relationship skills
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Professional Experience:

Financial Sales Representative
Key Energy Services, Freehold NJ
November 2006 – Present

- Interviewed clients to evaluate their financial status and formulated a financial plan accordingly.
- Reviewed financial information received from clients and outlined strategies to meet client's financial goals.
- Handled sales of financial products.
- Evaluated clients' accounts and plans on a regular basis.

Financial Sales Representative
SilkRoad Technology, Freehold NJ
February 2001 – October 2006

- Suggested strategies to clients so that they achieve the desired financial goals.
 - Advanced client bases and build new clients.
 - Handled client queries.
 - Coached junior staff.
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Education:

Bachelor's Degree in Accounting
Iona College, New Rochelle, NY

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