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## Financial Services Associate Resume

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### Job Objective

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To obtain a Financial Services Associate position in a company that provides an open environment with many opportunities for continuous growth.

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### Summary Skills:

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Remarkable experience in Investment sales, insurance and financial profiling  
Skilled in the preparation, review, and analysis of financial statements  
In-depth knowledge of financial systems controls, accounting and functional support services  
Proficient with data entry, word processing, and spreadsheet  
Ability to add, subtract, multiply, and divide  
Ability to understand and interpret financial policies, procedures, and regulations  
Excellent Interpersonal Skills  
Proven record of accuracy and attention to detail  
Good Business Communication Skills and the ability to Problem Solve, and develop ideas

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### Work Experience:

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Financial Services Associate, August 2005 to till date  
People's United Bank, Summit, NJ

- Solicited new customers through approved techniques and methods and conserved existing insurance and investments products.
- Provided service of the insurance and investment needs of all owners of policies.
- Developed finance related programs and prepared sales presentations.
- Provided exemplary services in processing loans, surrenders, changes in beneficiary, claims, policy options, and the like.
- Maintained records of account, and rendered when required.
- Conformed to and abided by the procedures, rules and requirements.
- Suggested insurance and investment products to candidate.

Financial Services Associate, May 2000 to July 2005  
Amscot Financial, Inc., Summit, NJ

- Provided financial services to customers.
  - Performed a variety of customer banking transactions and provided quality service to existing and new clients adhering to rules, regulations, and guidelines of the Bank.
  - Participated in the development of client relationships by cross-selling banking products and services as appropriate.
  - Assisted in the achievement of branch sales goals by developing, setting and achieving personal sales and referral goals.
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### Education:

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High School Diploma, Thomas Jefferson University, Pennsylvania, PA

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