
IRA Specialist Resume

Job Objective

Looking for work within the company in the position of IRA Specialist. Experienced with behind the scenes managerial duties as well as hands-on work in the industry.

Highlights of Qualifications:

- Remarkable experience in CD & IRA processing
 - Huge knowledge of IRA rules
 - Steep knowledge of Ally Bank's products
 - Familiarity with Windows-based PC skills
 - Amazing ability to multi-task
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Professional Experience:

IRA Specialist
Capital One, Staten Island, NY
May 2006 – Present

- Managed operational administration of Individual Retirement Accounts.
- Handled IRS compliance and system integrity.
- Assessed receipt of Retirement Account Transaction forms.
- Aided employees and customers.
- Updated individual customer files.
- Administered Retirement account transfer requests.
- Reviewed IRA distributions and conducted research.

IRA Specialist
Ally, Staten Island, NY
March 2003 – April 2006

- Acted as primary contact for resolution of IRA issues.
 - Managed filing and file maintenance.
 - Coordinated with Customer Call Center.
 - Suggested policy changes to management.
 - Formulated varied reports for management.
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Education:

Bachelor's Degree in Accounting
St. Francis College, Brooklyn, NY

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