

FINANCIAL SERVICES SUPPORT SPECIALIST

Customer-focused professional with experience in banking customer service and team leadership. Well-versed in working with a variety of individuals from diverse backgrounds and resolving complex issues promptly. Adept at prioritizing tasks, working under pressure in challenging environments, and driving value-driven partnerships.

EXPERIENCE

MFS Investments, Boston, MA.

August 2024 - Present

Client Service Associate

- Resolves basic account problems and questions; initiates research on more complex problems by directing to appropriate work area for resolution
- Processes a variety of routine and complex financial and non-financial transactions while meeting or exceeding department Standards for productivity and Quality
- Communicates by telephone, fax, and email correspondence with shareholders, participants, broker/dealers and others to verify information and clarify requests or provide proper documentation to customers as requested.

FIRST REPUBLIC BANK, Boston, MA

May 2021-June2023

Consumer Services Specialist

Serve as a primary customer contact for assistance with banking services, transactions, and various inquiries via telephone and email.

- Corresponds with customers in an upbeat, professional manner on a wide variety of banking needs.
- Investigates card transaction details within Visa to identify issues with authorizations.
- Performs transactions such as loan payments, deposits, withdrawals, transfers through online channels.
- Troubleshoots members' issues with online banking systems to overcome blockers.
- Works cross functionally with many different bank teams and departments to resolve customer inquiries and provide solutions to customers in a timely manner.
- Prioritizes a large number of tasks, ensuring each issue is resolved by its expected timeline.

BANK OF AMERICA, Malden, MA

February 2019—May 2021

Client Service Representative/Relationship Banker

- Provided fast and accurate communication and processing of orders, ensuring excellent customer service.
- Sold financial products such as credit cards, CDs, IRAs, and small business loans.
- Opened deposit accounts and quoted rates, terms, and programs for loan customers.

EXCEL ACADEMY CHARTER SCHOOL, East Boston, MA

August 2018—February 2019

Paraprofessional

- Provided small groups or 1:1 behavioral and academic support to a student with special needs.
- Provided 1:1 student support based on specific needs outline in his/her IEP.
- Provided inclusion support to students with special needs in general education and foundational level courses.