

JESSICA MEYERS

(774) 247-7748

45330 Ridgeway Road
Orangevale, CA 95662

PRIVATE BANKER

Visionary professional has more than 22 years of experience in Telemarketing and Finance, Sales and Account Management. Excellent communication and easygoing interpersonal skills make the candidate effective with clients, providers, officers and staff in various departments across job levels. Recognized customer service champion comprehends and interprets complex product policies and services concerns easily for patients and co-workers. Accomplished professional is actively seeking a role as Private Banker U1, eager to leverage key transferrable abilities in cold-calling, process improvement and innovation, marketing consulting, customer relationship building, leadership and problem solving. Performs and manages multiple tasks, both simple and challenging, effectively with little supervision.

- ✦ Client Account Administration/ Building
- ✦ Thorough in Sales Charting & Analysis
- ✦ Excellent Customer Service Skills
- ✦ Experienced Telemarketing Skills
- ✦ Scheduling/ Workflow Administration
- ✦ Goal-Oriented Problem Solving Skills

PROFESSIONAL EXPERIENCE

Principal Financial

Sept 2007 – Present

Internal Wholesaler
El Dorado Hills, CA

- ✦ Established proactive and professional sales calls with existing representatives to strengthen relationship and find selling opportunities.
- ✦ Maximized territory performance by strategically planning and executing sales campaigns, new business and follow-up meeting calls.
- ✦ Managed and organized high volume of activity; addressed and worked through challenges along the business development process.
- ✦ Oversaw completion of day-to-day tasks; scheduled quality appointments hebdomadally; identified inefficient process and led improvement activities.

Marchon Eyewear

Jan 2007 – Sept 2010

Account Executive
Rancho Cordova, CA

- ✦ Directed successful expansion of over 300-account base; enhanced marketability and promising product positioning.
- ✦ Exceeded sales quota with \$719k and \$628k in 2009 and 2010, respectively; perfected presentations using advanced technologies such as hosting webinars, among others.
- ✦ Assumed responsibility for prospecting and follow up of new VSP provider doctors throughout the sales process; maintained healthy relationship with partners and clients.
- ✦ Derived solutions and area improvements in sales; processed reports for meetings in timely manner and provided inputs for implementing solutions.

Residential Real Estate Sales & Loan Officer
Sacramento County, CA

June 1998 – Jan 2007

- ✦ Directed successful residential negotiations and closing, enhanced marketability and promising asset positioning.
- ✦ Obtained agreements from property owners to place properties for sales with real estate firm; assumed responsibility for securing supporting documentation.

- ✦ Initiated resale activities, and monitored timely fulfillment of purchase contract terms between parties; attained \$2-3 million in annual sales along with full time job.
- ✦ Provided intermediary negotiations between buyers and sellers, property prices and settlement details ultimately leading to closing transactions and leases.

OTHER WORK EXPERIENCE

WM Group Of Funds

Internal Wholesaler
Gold River, CA

Dec 2000 – Sept 2004

Franklin Templeton Investments

Supervisor /Fund Specialist
Rancho Cordova, CA

Jan 1997 – Dec 2000

Media Liaison Specialist

1991 – 1997

CERTIFICATION & TECHNICAL SKILLS

Microsoft Office Suite (Word, Excel, PowerPoint) ✦ Salesforce software ✦ Goldmine ✦ Salespage

Professional Certifications & Licenses: Series 7 and Series 63 (NASD)
License Licensed Realtor ✦ Series 6 License

Training: Fusion Sales Training

References Gladly Provided Upon Request