

MANAGER OF FINANCE

Professional Summary

Highly motivated individual with demonstrated proficiency in listening to clients needs, and formulating the tactical plan to achieve the best results for all parties involved. Constantly explores new and challenging opportunities to further elevate client loyalty and boost revenues. Known for honesty, integrity and a genuine passion for setting and achieving goals for self, while helping others attain theirs. Superior interpersonal dynamics interface seamlessly with others from all levels, backgrounds and cultures. Respected for maintaining a professional and positive demeanor. Career Achievements Quickly recognized financial instability within the company. Immediately identified the cause and formulated a plan that successfully resulted in the avoidance of bankruptcy which showed the stability needed to acquire an additional million dollars from investors. Finance and Operations Director for a multi million dollar premium finance company as well as agent within the parent company, simultaneously. Developed professional partnerships through interpersonal skills, integrity and honesty. Successfully obtained licenses through the state of North Carolina allowing me to become an Insurance agent for Property and Casualty for home and auto. Developed and streamlined a system of "checks and balances" to ensure proper resolution of financial situations, resulting in a 95% return of premium after cancellation. Trained 27 agents on standard operations and ethical practices to ensure professional service that proved successful in the overall growth and financial stability of the company. Qualification Highlights Intermediate level proficiency with Microsoft Office, Advanced with FinanceMaster and Jenesis software, both Financial and Client support databases. Outstanding ability to multi-task while working two separate software programs, provide technical support for both programs and maintain a website with ease, still providing excellent customer service to Clients on the phone and in the office. Reputed as a competent trouble shooter. Clients were confident that issues would be thoroughly investigated and resolved. Recognized as expert in client networking, as well as building and fostering long-term business relationships. Provided a high level of customer service and client relations based on outstanding communication and interpersonal skills. Strengthened the reputation of Insurance Payment Center and Johnson Insurance Management for quality personal service to increase referrals.

Skills

Work History

Manager of Finance , 01/2008 to 01/2012

Company Name " City , State

- Developing crucial business relations for the success of the company.
- Balancing relationships between clients and company's.
- Provide technical and website support for clients, agents and company's.
- Maintenance of 5000 active accounts, as well as 300 accounts currently in collections.
- Assisted with accounts payable/receivable.
- Utilized and maintained two client databases, websites.
- Responsible for processing notices and invoices.
- Currently process more than \$75,000 in customer payments weekly plus an additional \$20,000 in company refunds, and process \$40,000 in financing for new accounts, assuring that customers are in good credit standing with IPC.
- Collecting on more than 40% of bad debts weekly, which is up 95% since taking over the Director of Financing Position.
- Provide financing for more than 27 agents which work in 9 offices spread throughout North Carolina.
- Daily, weekly and monthly balancing of 5000 accounts and verification of funds received and delivered from all 9 agencies.
- Personally communicated with 17 different insurance companies, assuring them that policies and procedures are followed and in conjunction with ours.
- Consistently work with state regulations to make sure that laws pertaining to customer relations and national guidelines responsible for ethical insurance transactions are practiced daily to assure the correct treatment of clients.
- Daily managing of the office and client services to nullify conflict when dealing with accounts and past due payments or cancelled accounts.
- Developed client memos dealing with increases in payments, collections, and contract errors.
- Wrote policies and procedures pertaining to the daily operations for financing and the proper process on how to collect bad debt effectively for agents to follow.
- Trained a trusted agent within the parent company on the rules and regulations for financing to assure a secondary set of checks and balances was in place.

Insurance Agent , 01/2009 to 01/2011

Company Name " City , State

- Writing insurance policy's for home and auto coverage.
- Liaison for clients and 17 insurance companies.
- Processing claims and new business applications.
- Training new agents on state and federal regulations.
- Provided accountability and corrections for agent errors company wide.
- Highly recognized by companies as support to troubleshoot and correct complicated agent errors and sought by clients for further explanation of their insurance policies.
- Ability to maintain multiple accounts simultaneously assuring good standing and proper support.
- On a monthly basis, created more than 80 new accounts resulting in an increase of more than \$40,000 of revenue.
- Owner requested my assistance to build new relations and rebuild current client relations due to lack of customer service from previous agents.

Grocery Manager , 01/2007 to 01/2008

Company Name " City , State

- Ensure excellence in customer service, Review of operating and financial reports to determine the status of the store relative to budgeted sales, expenses and payroll.
- Associate management and development, Associate training and evaluations.
- Responsible for Ordering, Maintaining inventory, developed and implemented plans of action to reduce overhead expenses and loss, Merchandising to ensure an increase in profits and conducted formal "store walks" to ensure optimum store conditions, product quality, freshness, availability while completing documentation in accordance with Foodlions standard practice guidelines.

Manager , 01/2004 to 01/2007
 Company Name – City , State

- Ensured a high level of customer service through staff development, increasing employee morale and retention, leading my staff of 30 by example.
- Scheduling and financial review.
- Monitored compliance with health and fire regulations regarding food preparation, serving and building maintenance.
- Organized and directed staff training, resolved personnel issues, hired new staff, and evaluated employee performance.
- Monitored food preparation, size of portions, garnishing and presentation of food to ensure food is prepared and presented to highest quality and satisfaction.
- Investigated and resolved complaints regarding food quality and service.
- Assisted with planning menus and food preparations based on anticipated number of guests, palatability, popularity, and costs.
- Assisted with creating specialty dishes for daily specials.
- Kept records required by government agencies regarding sanitation and food subsidies where indicated.
- Bartending, coordinating special events for large parties and catering.

Education

Bachelor of Science : Organizational Management , 1 2016

Charleston Southern University - City , State

Organizational Management Currently enrolled in the CAPs online program North Carolina license, Casualty Insurance

North Carolina license, Property Insurance 2009 Charlotte, NC Certification, Store management and operations 2007 Foodlion Management

Wadesboro, NC Certification, Restaurant management and Operations 2004 Jocks and Jills Sports restaurant Charlotte, NC Associate of

Science : 1 2009

City , State

Information Technology Certification, Medical Assistant 1995 : South Piedmont Community College - City , State

American Career College - City , State

GPA: with top honors. with top honors. South Carolina license, property and casualty 2011

Accomplishments

- Non resident licenses Charleston, SC Affiliations North Carolina Department of Insurance North Carolina Chamber of Commerce Association of Agents in North Carolina South Carolina Department of Insurance So we need to fix the way the name is laid out We need to refine the verbiage.
- Set all words to past tense.
- cant use currently you aren't doing it now) Bullet information Keep info direct and forget words that embellish or leave to interpretation.

Skills

accounts payable, credit, client, clients, client relations, customer relations, customer service, databases, documentation, special events, Financing, financial, funds, government, Information Technology, Insurance, inventory, Director, managing, Merchandising, office, payroll, personnel, policies, quality, sales, Scheduling, staff development, staff training, troubleshoot, website, websites