

MORTGAGE BANKING EXECUTIVE ANALYST

Summary

Focused Operations Manager successful in contract negotiation and process improvement. Remains calm and poised even in high-pressure situations. Leverages in-depth knowledge of industry trends and shifts to offer valuable insights on opportunities for new growth and expansion.

Highlights

Change management

Policy/program development

Cross-functional team management

Staff training

Supervision and training

- Operations management

Skilled negotiator

Sound judgment

Computer-savvy

Calm under pressure

Complex problem solving

Accomplishments

Business Development: Â

- Successfully grew business by [action].

Project Management: Â

- Initiated [project] which resulted in [positive outcome].

People Management:

- [Describe accomplishment 1]
- [Describe accomplishment 2]

Financial Management:

- [Describe accomplishment 1]
- [Describe accomplishment 2]

Research

- Conducted research which led to the development of [program].

Leadership

- Served as key contributing member to Leadership team.

Experience

Company Name January 2009 to Current Mortgage Banking Executive Analyst

City , State

- Responsible for escalated issues and problem solving providing support by answering inquiries for Internal and External Partners, Senior Management and Third Party Customers relating delinquent mortgage accounts with the intent to bring delinquent accounts current.

- Responsible for researching and providing customized documentation to Senior Executives and Management on servicing and default related issues.
- Ability to work with Servicing Systems as well as accurately analyze information from the system with in depth knowledge of Chase products and services Participation in various initiatives and initiate improvement in departmental projects.
- Collaborated with legal and compliance to ensure accurate resolutions are provided on escalated mortgage issues Monitor and research Government Agencies concerns pertaining mortgage lending practice for customers and communicate a response either by telephone and or written response.
- Create reports for senior management for monthly volume of correspondence received from the office of Consumer Financial Protection Bureau and the Office of the Comptroller.
- Built and maintained relationship with internal/external partners.
- Communicate with customers either by telephone communication and or written response to assist them with their concerns about their mortgage issues Handle 300 cases weekly from Loss Mitigation including cases involving suspicious activity.
- Tracked and communicated business goals for team to meet weekly, monthly matrix and provided daily report to upper management of team/department performance and SLA.
- Self-authored written responses, adhering to Chase's business letter-writing guidelines and within RESPA guidelines.

Company Name January 2003 to February 2015 Business Manager - Analyst

- Research accounts when needed to resolve delinquency & payment issue that has been applied incorrectly and issue credits when needed.
- Term employee's from group life plan when needed also groups for non-payment, salary changes, and collection calls, send delinquent letters on account 30-45 day.
- Take inbound customer relation calls from brokers and clients assisting with resolving issues pertaining to problems from billing, enrollment, credits, terminations etc.
- Responsible for accurate and timely processing of new firm installation of new sold cases (small, large, voluntary, self-administered), benefit changes, and maintenance for administration Collaborate with clients, A/R and Sales to increase speed of receivables and prevent interruption of service to clients Work extensively with Executive Directors
- Management on escalated cases with billing discrepancies for test plans and cases for the business process of applications Manage workflow of Supervisors and upper level Management.
- Responsible for various project management gathering information and documentation for test plans and cases for the business process of applications Supervise a staff of 25 people.
- Vera Perry Cont. __.
- Managed team of 25

Company Name January 2006 to January 2009 Deposit Recovery Collector

City , State

- Risk Management Deposit Recovery Collector Was responsible for customer communications to make to scheduled payment arrangements to bring past due accounts current.
- Worked on an quantrax Auto Dialer system.
- Recorded customer communications and document accounts within the department metrics and company policy for collection and accounts receivable efforts to keep accounts within company current status.

Company Name January 2003 to January 2007 Senior Tax Preparer Manager

City , State

- Served as executive assistant to the management team, handled a busy phone system, functioned as primary liaison to customers and ensured a consistently positive customer experience.
- Helped drive a 10% increase in customer satisfaction (as measured by a customer survey in (2003-2007).
- Created automated daily stats report that reduced inaccuracies and provided management with an important decision-making tool.
- Quickly became a trusted assistant to the company president, executive staff and office manager and earned a reputation for maintaining a positive attitude and producing high-quality work.
- Trained new tax preparer and audited processed work to assure the accurate information was being reported to the IRS in behalf of the customer individual and business taxes.
- Managed a staff of ten (10) plus tax preparers.

Skills

accounts receivable, billing, Business Analysis, business process, CMS, clients, customer satisfaction, decision-making, documentation, Senior Management, Fast, Financial, Government, Imaging, legal, letters, Lotus, Excel, Office, PowerPoint, Microsoft Word, office manager, Oracle, Peach Tree, phone system, problem solving, producing, project management, quality, researching, Research, Risk Management, Sales, SLA, Solomon, tax, taxes, telephone, Workflow, written

Education

San Francisco State University Bachelors of Science : Management City , State Management

CAL State Hayward Bachelor of Business Administration : Accounting City , State Accounting

BA

BS