Freya Vazquez

Client Service Representative

(214) 555-0123 freya.vazquez@example.com
linkedin.com/in/freyavazquez 123 Maple Lane, Dallas, TX 75201

STRENGTHS

Adaptability
Demonstrated flexibility when balancing multiple client agendas. Clients appreciate my quick adjustments during changing priorities.

Communication Skills
Established trusting relationships with clients through open dialogue. Received feedback highlighting responsiveness and clarity during exchanges.

Problem-solving Acumen
Applied critical thinking to resolve client issues swiftly. Empowering clients is my priority during challenging circumstances.

Organizational Skills
Streamlined client information workflows improving retention and retrieval efficiency. This encoding has resulted in smoother operations overall.

Team Collaboration
Strongly valued within the team for collaborative efforts on major projects. Colleagues often rely on my input for solving tough problems.

SKILLS

- Client Relationship Management
- Microsoft Office Suite
- Time Management
- Service Workflow Optimization
- Confidentiality Compliance
- Data Entry Skills
- Document Preparation
- Performance Tracking
- Financial Reporting

SUMMARY

Dedicated Client Service Representative with extensive experience in retirement services. A proven track record exists for fostering strong client relationships and delivering customized solutions aligned with client goals. Skilled in managing multiple projects as well as ensuring timely documentation processes. Committed to enhancing client satisfaction through effective communication and a deep understanding of service plans. Strongly experienced in preparing accurate materials for investment reviews and seamless document processing, contributing positively to team dynamics and client outcomes.

EXPERIENCE

Client Service Associate

Future Insights Group | January 2022 - Present | Fort Worth, TX

Focused Client Service Associate known for exceptional client engagement by efficiently addressing inquiries. Tasked with preparing detailed materials for client meetings, emphasizing clarity and precision in all communication. Main responsibility involves processing investment change requests within operational guidelines while maintaining robust client records.

- Create comprehensive reports and presentations for investment review discussions.
- Support account managers with tailored solutions that enhance the client journey.
- Ensure accuracy in processing paperwork while adhering to compliance protocols.
- Contribute effectively to team outputs while consistently meeting deadlines.

Client Services Coordinator

WealthWise Advisors | June 2020 - December 2021 | Houston, TX

Results-driven Client Services Coordinator recognized for strengthening client ties. Responsible for implementing diverse strategies that elevate the overall client experience. Collaborated across various teams to ensure documentation accuracy for investment plans, streamlining workflows and enhancing overall efficiency.

- Engaged closely with internal stakeholders on strategic service delivery.
- Managed complex project documentation establishing compliance and clarity.
- Develop professional relationships with clients through consistent support.
- Monitor service workflow adherence to sustain data integrity and efficiency.

Client Service Intern

Financial Pathways Inc. | June 2019 - August 2019 | Austin, TX

Proactive Client Service Intern who supported extensive projects related to retirement planning. Gained invaluable insights into operational tasks vital for delivering excellent customer service. Hemisphere-focused assignment involved assisting with preparation and presentation of pertinent documents for prospective clients.

- Supported senior staff in assembling investment review content.
- Processed incoming paperwork following stringent procedural standards.
- Gained foundational knowledge of client-centric operational strategies.
- Communicated with clients regarding updates to ensure complete transparency.

LEADERSHIP & AWARDS

- Outstanding Client Service Achiever in 2025 at Future Insights Group.
- Recognized for Excellence in Team Collaboration at WealthWise Advisors.

EDUCATION

Bachelor's Degree in Business Administration

University of Texas | GPA: 3.8 | 2019 | Austin, TX

Regulatory Knowledge

Conflict Resolution

Analytical Thinking

Client Education

Customer Support

Target Achievement

Investment Strategy Understanding

LANGUAGES

English — Native

Spanish — Intermediate

MY CAREER

- Client Service Associate at Future Insights Group (4.4 Years)
- Client Services Coordinator at WealthWise Advisors (1.5 Years)
- Client Service Intern at Financial Pathways Inc. (2 Months)

Coursework: *Finance, Marketing, Management, Economics*

CERTIFICATIONS

- Producer's License for Life/Health 2022
- Certified Retirement Counselor (CRC) 2023

TECHNICAL SKILLS

- **Client Management Software:** Salesforce, Zoho CRM, HubSpot
- **Data Analysis Tools:** Excel, Tableau, Google Analytics
- **Documentation Tools:** Microsoft Word, Google Docs, Evernote
- **Project Management Tools:** Trello, Asana, Microsoft Project
- **Communication Platforms:** Zoom, Microsoft Teams, Slack
- **Presentation Software:** PowerPoint, Prezi, Canva
- **Email Communication:** Outlook, Gmail, ProtonMail
- **Compliance Tracking Software:** SMARTS, Actimize, ComplianceAlpha
- **Survey Tools:** SurveyMonkey, Typeform, Qualtrics
- **Research Tools:** Statista, Pew Research, JD Power

PROFESSIONAL AFFILIATIONS

- Member of the National Association of Client Service Professionals.
- Active participant in local community wellness events.

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST