Thao Walton

(417) 555-1234 | thao.walton@example.com | linkedin.com/in/thaowalton | Springfield, MO 65807

SUMMARY

Driven sales professional passionate about helping clients achieve their financial goals through personalized strategies. Experienced in building relationships and generating new business opportunities, with a focus on client satisfaction and retention. Proficient in virtual client interactions and skilled in delivering exemplary service in a performance-based environment. Committed to ongoing learning about financial products and compliance standards to provide clients with relevant and effective solutions. Eager to contribute to team success through collaboration and strategic problem-solving.

EXPERIENCE

Inbound Sales Representative
January 2026 - Present

Stratford Financial Services — *Remote*

Supported client success by developing tailored financial strategies during virtual meetings. Engaged with prospects through proactive outreach to create new business connections and foster long-term relationships, enhancing overall client satisfaction.

- Cultivated strong client relationships via virtual meetings, boosting client loyalty.
- Identified opportunities for client growth through proactive networking, contributing significantly to overall revenue.
- Created customized financial strategies that empowered clients to make informed decisions.
- Collaborated with colleagues to share insights, improving collective sales techniques.
- Monitored industry trends regularly for accurate and timely advice.
- Recognized for exceeding quarterly sales targets consistently.

Sales Associate
June 2024 - December 2025

Springfield Financial Group — *Springfield, MO*

Performed effectively in supporting clients' financial needs by analyzing information and presenting custom solutions fit for individual situations. Worked tirelessly to maintain relationship quality through diligent follow-ups and the provision of significant product insights.

- Guided clients in recognizing and meeting their financial objectives, elevating client outcomes.
- Conducted follow-ups to ensure customer expectations were met consistently.
- Enhanced skills by participating in detailed product training programs.
- Facilitated the onboarding process for new hires by sharing valuable resources and experiences.
- Evaluated market data to pinpoint growth areas, aligning offerings with client demands.
- Achieved top sales status within the team for multiple fiscal periods.

LEADERSHIP & AWARDS

- Recognized as Top Performer of the Quarter for outstanding sales achievements at Stratford.
- Awarded Certificate of Excellence for exemplary customer service by Springfield Financial Group.

EDUCATION

Bachelor of Science in Business Administration
2024

University of Missouri GPA: 3.5 — *Columbia, MO*

Coursework: *Financial Planning, Marketing Principles, Business Ethics, Sales Management*

CERTIFICATIONS

- Certified Sales Professional (CSP) 2026
- Fundamentals of Financial Planning Certification 2025

TECHNICAL SKILLS

- **Customer Relationship Management Tools:** Salesforce, HubSpot, Zoho CRM
- **Communication Platforms:** Zoom, Slack, Microsoft Teams
- **Sales Analytics Software:** Google Analytics, Pipedrive, InsightSquared
- **Financial Planning Tools:** Excel, QuickBooks, Mint
- **Social Media Platforms:** LinkedIn, Facebook, Twitter
- **Time Management Tools:** Trello, Asana, Todoist
- **Presentation Software:** Microsoft PowerPoint, Google Slides, Prezi
- **Email Marketing Tools:** Mailchimp, Constant Contact, Sendinblue

- **Market Analysis Tools:** Hootsuite, SEMrush, Ahrefs
- **Webinar Platforms:** GoToWebinar, WebEx, Zoom Webinar

SKILLS

- Sales Strategy
- Client Relationship Management
- Financial Planning
- Remote Communication
- Time Management
- Market Analysis
- Negotiation Skills
- Customer Engagement
- Product Knowledge
- Goal Orientation
- Compliance Awareness
- Outreach Techniques
- Networking Skills
- Team Collaboration
- Presentation Skills

PROFESSIONAL AFFILIATIONS

- Active Member of the Finance Club focused on community engagement and financial literacy.
- Volunteer Coordinator at Local Community Center, organizing informative workshops.

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST