FEDERAL RETIREMENT BENEFITS SPECIALIST RESUME

Summary:

A self-motivated and active individual with excellent communication and interpersonal skills; Ability to prioritize, meet deadlines and work with minimal or no supervision; Prepare/ present programs to groups from diverse background; Comprehend complex programs; Keep accurate/ detailed records and reports; Exercise critical human relations skills and maintain confidentiality; Determined to deliver effective strategies, methods, materials and settings to correspond with the needs; Has a good and strong communications and interaction skills.

Professional Experience:

Senior Federal Retirement Benefits SpecialistJanuary 2007 – Present
Department of State, Colorado Springs, CO

Responsibilities:

- Provided relevant information, education, and guidance in an effort to retain and increase assets.
- Quickly and accurately identified and assessed the customer's stated and unstated needs.
- Analyzed the customer's plan to understand rules, regulations and tax implications of the plan, as well as customer objectives.
- Assessed the customer's investment experience and knowledge, preferences and action orientation, and retirement goals.
- Discussed various 'what if' retirement and investment scenarios and potential impact.
- Provided guidance/advice (using appropriate tools) on investments and services to meet the customer's financial goals.

Benefits SpecialistMay 2004 – December 2006
PRC, Plantation, FL

Responsibilities:

- Analyzed benefits data for accuracy and made recommendations for improvements.

ssociate Benefits SpecialistFebruary 1999 – May 2004
Paychex, San Diego, CA

Responsibilities:

- Provided relevant information, education, and guidance in an effort to retain and increase assets.
- Quickly and accurately identified and assessed the customer's stated and unstated needs.
- Analyzed the customer's plan to understand rules, regulations and tax implications of the plan, as well as customer objectives.
- Assessed the customer's investment experience and knowledge, preferences and action orientation, and retirement goals.
- Discussed various 'what if' retirement and investment scenarios and potential impact.
- Provided guidance/advice (using appropriate tools) on investments and services to meet the customer's financial goals.

Benefits SpecialistMay 2004 – December 2006
PRC, Plantation, FL

Education:

Master of Science in Business and Finance
Stanford University, CA, 1999
Bachelor of Science in Business Administrations
Stanford University, CA, 1997

Skills:

- Proficiency with MS Office Word, Excel PowerPoint and other business-related software
- Excellent English communication and writing skills
- Can work under pressure, empathic and can multi-task
- Can Interact with different socio-economic backgrounds
- Ability to Synthesize
- Accounting Technical Skills

- Analytical Skills
- Computer Competency
- General Business Skills
- Team Orientation

Awards and Honors:

Dean's Lister, Stanford University, 1997
Senior Member, MBA Association