

Taylor Heinen

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Professional Objective

To excel in a sales and service environment for benefit of the organization while pursuing continued professional growth.

- 6+ years of experience in retail banking involving sales, customer service, operations, lending, and leadership
- Focused on associate and customer financial education to encourage sound financial choices using bank products and services
- Superior knowledge and experience in sales and maintaining a pipeline
- Founded and presided over a non-profit theatre group that produced 10 shows, raised over \$20,000 in revenue, and coordinated 100+ volunteers

Professional Experience

Simmons Investment Services, LPL Financial, Jonesboro, AR (2022-Current)

Client Associate

- Pre-appointment preparation for Financial Advisors
- Post-appointment follow up/document processing for Financial Advisors.
- Review all paperwork for accuracy, completeness and compliance.
- Client service duties such as establishing new accounts, servicing existing accounts, and researching and resolving deficiencies in a timely manner.
- Preparing, editing and obtaining appropriate compliance approval on correspondence.
- Gather all materials as requested by the Financial Advisor for meetings and sales representations.

Notable Accomplishments

- FINRA Securities Industry Exam (08/12/22)

Simmons Bank, Jonesboro, AR (2019-2022)

Assistant Financial Center Manager

- Demonstrate and educate associates to share the bank's full scope of resources, including traditional in branch services, digital capabilities, and business partner resources
- Meet regularly with Branch Manager regarding goal progress, communication skills, and growth opportunities to build employees' confidence, competency and efficiency
- Recruit, train, develop, evaluate and coach staff to ensure expectations for their positions are met
- Ensure that established goals are met by providing valued solutions and recommendations uncovered through a needs-based philosophy
- Lead a partner-centric team that works with small business, corporate and institutional partners, and mortgage and financial advisors

Notable Accomplishments

- Executed training and communication techniques to consistently exceed sales goals
- Consistently grew loan growth of previous two years to exceed loan goals in Q42021 to resulting in meeting three of three Redder the Better Retail Incentive Plan goals
- Achieved Satisfactory audit findings with all audits conducted
- Used cross-functional communication to better understand how the retail space impacts other areas of bank operations
- Used coaching and leadership techniques to grow and inspire associates and peers

Regions Bank, Jonesboro, AR (2017-2019)

Financial Relationship Senior Consultant

- Conduct outside sales efforts to generate new clients, and expanding existing client relationships
 - Responsible for keeping branch compliant with all bank policies, procedures, and audits
 - Educate and advise customers on products and services, including loans and deposit products
 - Assist Branch Manager with coaching and development of associates, including responsibilities regarding sales and other leadership activities
 - Exceeded all Retail Incentive Plan goals every quarter the position was held
 - Other positions held:
 - Financial Relationship Specialist
 - Teller
- **NMLS Obtained

Memberships

- Jonesboro Regional Chamber of Commerce (2020-Current)
 - Jonesboro's Young Professionals Network
- Center Stage Productions (2017-Current)
 - Founder/Executive Director
- Graduated Jonesboro Regional Chamber of Commerce Emerging Leaders, Class of 2022
 - Nominated by: Sabrina Freeman
 - Mentor: Jonesboro Mayor Harold Copenhaver