

Aisha Patel

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SUMMARY

Detail-oriented and motivated recent graduate with a Bachelor's in Finance and a strong foundation in mortgage processing. Proven ability to analyze financial data and provide clients with tailored mortgage solutions, alongside effective communication skills to build lasting relationships.

EXPERIENCE

Mortgage Assistant

Jun 2021 - Present

Capital Mortgage Solutions, Phoenix, AZ

- Assisted in processing over 100 mortgage applications monthly, improving application turnaround time by 25%.
- Developed client follow-up procedures that enhanced customer satisfaction scores by 15%.
- Utilized Encompass software to maintain accurate and timely records of loan status and client interactions.

Intern - Financial Services

Jan 2021 - May 2021

Greenwood Financial, Phoenix, AZ

- Conducted market research that identified potential growth areas, contributing to a 10% increase in client acquisition.
- Created financial reports that assisted senior brokers in making informed lending decisions.
- Participated in team meetings to strategize on client engagement, leading to improved service delivery.

Customer Service Representative

May 2019 - Dec 2020

ABC Bank, Phoenix, AZ

- Resolved customer inquiries efficiently, achieving a 95% customer satisfaction rating.
- Provided detailed information on loan products, leading to a 20% increase in product uptake.
- Trained new staff on customer interaction protocols, reducing onboarding time by 30%.

EDUCATION

Bachelor of Science in Finance

May 2020

Arizona State University, Tempe, AZ • GPA: 3.7

SKILLS

Technical Skills: Financial Analysis, Loan Processing, Data Analytics, Client Relationship Management

Tools & Frameworks: Encompass, Microsoft Excel, Salesforce, QuickBooks