

JOHN DOE

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EXPERIENCED SENIOR ACCOUNTANT

SUMMARY

A highly competent professional with experience in coordinating financial record-keeping and providing financial guidance as well as management expertise related to customer operations and financial strategy. Supervises investment strategies and direct financial resources, demonstrating the ability to make decisions and solve problems individually and as a part of a team. Engages in collecting, processing, analyzing, and recording financial data to help clients facilitate transactions, formulate smarter business decisions, and improve their financial status. An assertive leader with strong communication skills, adept in processing client assistance applications while ensuring client satisfaction and retention, as well as providing excellent customer service. Showcasing superior knowledge of regulations and procedures necessary for multi-program caseload administration. Responsible for writing social summaries and completing hearing summaries for various medical assistance cases. Self-motivated professional eager to master new challenges and contribute to the overall success of the company.

SKILLS

- Business development
- Financial accounting
- Payroll administration
- Analytical skills
- Leadership skills
- Business administration
- Process improvement
- Accounts reconciliation
- Budgeting and forecasting
- Communication skills
- AR/AP
- Financial analysis
- General ledger
- Relationship building
- Financial reporting

EXPERIENCE

Eligibility Specialist/Assistance Payment Specialist
Company, City, ST

02/09 – Present

Adept professional with strong analytical thinking skills and experience determining whether applicants for various programs meet the required qualifications. Conducts fact-checking, record keeping, and advocacy on behalf of clients on a regular basis. Determines eligibility for loans, financial assistance, unemployment, veteran's benefits, publicly or privately funded healthcare insurance, counseling, and social service programs. Continuously regulating elderly and disabled people's eligibility for Medicaid and Medicare cost-sharing reduction programs. Assesses low-income families' eligibility for various benefits based on state and federal policies and guidelines while evaluating customer needs. Collects homeowners' mortgage payments, paying tax and insurance bills, and helped homeowners in default to get current. Responsible for the maintenance of insurance records and timely premium disbursements for all escrowed loans. Monitors the work of insurance vendors to ensure premiums are paid and any customer-related issues are properly resolved.

- Conducts intake interviews to assess and properly address client's needs
- Documents all customer inquiries and comments thoroughly and quickly
- Interviews applicants and explaining the scope of different available benefits accounts
- Significantly contributes to the company's revenue by reconciling commissions for more than 75 insurance carriers, including commercial lines, personal lines, health, and benefit carriers

Insurance Specialist
Company, City, ST

12/06 – 02/09

Responsible for interpreting insurance plans and providing risk management advice to clients and managers. Ensured that government insurance programs comply with federal laws, regulations, and contracts within the healthcare industry. Demonstrated a thorough understanding of risk management and created comprehensive solutions that fit into the client's portfolio effectively. Managed clients' accounts and maintained contact with clients after the application process. Answered all questions about the products, verified documentation, maintained client files, while being up to date with complex insurance regulations. Performed other administrative support duties as needed, displaying adaptability and willingness to learn.

- Collected homeowners' mortgage payments, paying tax and insurance bills, and helped homeowners in default to get current
- Responsible for the maintenance of insurance records and timely premium disbursements for all escrowed loans
- Monitored the work of insurance vendors to ensure premiums are paid and any customer-related issues are properly resolved
- Reviewed closing documents within the imaging system as research requires
- Completed reports and logs to ensure accuracy of insurance information in the system and delivered relevant information as well as policies to the vendor to update the system
- Managed the database by obtaining information and processing renewals as well as endorsements

Bank Teller/Data Entry Clerk
Company, City, ST

03/01 – 02/09

Served customers by completing account transactions. Provided account services to customers by receiving deposits and loan payments, cashing checks, issuing savings withdrawals, and recording night as well as mail deposits. Assisted customers by answering questions, processing transactions, and assisting them with other bank business while handling many of the bank's clerical and administrative duties. Provided exceptional customer service and managed routine tasks, including processing payments, accepting deposits, and handling withdrawals. Responded to customer requests and inquiries, made recommendations about bank products and services, maintained and balanced cash supplies, and kept track of bank records as well as financial information.

- Assisted customers with processing transactions, such as deposits, withdrawals, and payments, resolving complaints or account discrepancies, and answering questions
- Informed customers about various bank products and services
- Tracked, recorded, reported, and stored information related to transactions, bank supplies, and customers, ensuring all information is accurate and complete
- Maintained and balanced cash drawers and reconciled escalated discrepancies
- Kept a clean, organized work area and a professional appearance
- Handled currency, transactions, and confidential information in a responsible manner
- Used software to track bank information and generate reports
- Followed all bank financial and security regulations and procedures

EDUCATION

General Studies in Accounting
University, City, ST

2000