

Client Services Specialist Cover Letter

3578 Tommie Run New Dewittton, VA 11491

Dear Story Hill,

In response to your job posting for client services specialist, I am including this letter and my resume for your review.

In my previous role, I was responsible for a single point of contact to all external Prime Brokerage clients and to the business itself respective to all Asset Servicing needs.

Please consider my experience and qualifications for this position:

- Works well independently part of team
- Experience in a high volume retail car dealership is preferred
- Knowledge of the securities industry, various types of investment vehicles, and trading methods
- Knowledge of general securities rules financial industry regulations and terminology
- Process enrollments, contributions, investment allocations, disbursements, beneficiary designations, address changes and perform quality assurance
- Assist with the receipt of all incoming documentation and entering them into a imaging/workflow management system
- Provide issue resolution support to clients by researching, analyzing, calculating, posting, and accounting for any adjustments that need to be made to participant and plan level accounts
- Assist the Workflow Management Team manager on projects involving quality initiatives and improved efficiencies

Thank you for taking your time to review my application.

Sincerely,

Frankie Roob