
Paula Jones

Address Line 1

Address Line 2

Hartlepool, Post Code.

Telephone: 0191 123456 (Day), 01429 123456 (Evening), Mobile: 07812 123456

Email: paulajones123@email.com

MORTGAGE ADVISOR

◆ Staff Training - Compliance - CeMap - Sales ◆

A trusted, independent adviser on all mortgage schemes covering all types of mortgage and repayment methods. Consulting on costs and fees for first time buyers, buy to let, re-mortgages, change of lender, and improved mortgages. Wide range of selling skills and vast knowledge of mortgage market and policy. Skilled in optimising team potentials through delivery of management training whilst promoting best practice encouraging a self development culture. Now looking to remain within the Banking/Finance sector, preferably in a training role rather than sales.

AREAS OF EXPERTISE

- Business development
- Management training
- Sales initiatives
- Identifying customer needs
- I.T. / Computer literacy
- Staff training / development
- Tutor / Mentor / Coach
- Extensive product knowledge
- Trouble shooting / problem solving
- Financial controls / budgeting
- Mortgage expertise
- Customer service
- Leading change
- Recruitment
- Team leadership

PROFESSIONAL DEVELOPMENT

CeMap	Certificate of Mortgage Advice and Practice	1999
FPC 1	Financial Planning Certificate (level 1)	1996
CFSP	Certificate of Financial Service and Practice	
Registered	with the Mortgage Code Register of Intermediaries.	1991

Various courses include: Planning business development, managing others, effective administration, product knowledge, team leading, sales and negotiation skills. customer care / follow up / retention, first class consultation, identifying customers needs, sales administration, expanding client bases, exceeding targets, business quality / production, presentations promotional initiatives, negotiating.

northern rock PROFESSIONAL EXPERIENCE AND SIGNIFICANT ACHIEVEMENTS

PERSONAL SALES MANAGER

May 98 - Present

Write Company A Here

Responsible for mortgage lending with cross selling of other insurance products in a compliant and organised manner. Main mortgage seller in one of the largest branches in the network. Experienced in policy, achieving sales targets and training.

- Increased business by over 25% mainly through developing selling skills and cross selling.
 - Top Mortgage Advisor in the area year-to-date.
 - Authorised under FSA.
 - Ensured recommendations meet clients' needs and within best practice.
 - Dealt with customers both face-to-face and over the telephone.
 - Constantly highlighted areas of improvement and compiled financial planning reports.
 - Also as Office Manager supervised branch staff.
 - Delivering first class customer service and adhere to Regulatory requirements.
 - CeMap qualified mortgage advisor. Authorised under FSA to advise and recommended mortgages and insurance sales. Proven sales experience with drive, enthusiasm and determination.
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PROFESSIONAL EXPERIENCE AND ACHIEVEMENTS (CONTINUED)

As a Staff Recruiter / Trainer / Developer:

- Recruiting, developing and mentor to new staff. Hands-on training (shadowed) - up to 1 week every month.
- Evaluated training programmes for staff such as customer service and salesmanship.
- Delivered new training solutions that met the needs of the business and the people. Changing an (young) uncaring attitude to one of compliance.
- Follow-up research concluded improved budgets, increased profits and improved morale.

PERSONAL FINANCIAL ADVISOR (FPC1)

Apr 94 - May 98

Write Company B Here

- Independently advised clients on finances from pensions to mortgages to protecting income in a way that saves them money in the long run and providing for their financial security.
- High profile within a large branch.
- Authorised to deal with Life Assurance and Pensions.
- Increased business mainly through the development of an existing client base.
- Initiated a telemarketing strategy.
- Increased business by over 35% mainly through developing a client base around the UK.
- Won promotional awards.
- Dealt with high net worth private clients.

FINANCIAL ADVISOR

Feb 91 - Apr 94

Write Company C Here

- Offered a range of financial products (mortgages, life assurance, investment bonds, unit trusts, savings plans, pensions, etc).
- One of the Top Achievers in the North of England.
- Dealt with private clients and new and existing business clients.
- Significant number of referrals to private banking - One of the top introducers.
- Good spread of business / policies, year-to-date: Life Pensions 148, Pensions 45, Regular Savings 39, Investments 217 - lapse rate 2.6%

MORTGAGE ADVISOR

May 88 - Feb 91

Write Company D Here

- Gained wide range of branch skills within this busy local branch: Branch sales and mortgage advice, local lending, chief cashiering, reception, counter skills and running the office.

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Interests and Pastimes: Horse riding, golf, reading, cooking.
Licence: Full / clean.
Status: Married.
Born: 1965

References available on request.