

Lindsay Martin

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Relevant Skills

- Experience reading and analyzing loan documents
- Marketing and sales experience
- Strong knowledge of loan processing
- Ability to read and analyze credit reports
- Experience in training new employees
- Clerical and filing experience
- Experience reading and researching financial reports

Experience

Wells Fargo Bank – Denver, CO

Quality Assurance Analyst 2 – June 2013-present

- Reviewed and audited all financial and indicative transactions processed in the Denver loan center
- Read and interpreted complex wholesale loan documents
- Ensured that signed loan packages were accurately booked into system of record to meet Federal banking standards
- Assisted in training new employees
- Aided in the process of creating a policies and procedures manual for the Quality Assurance Department
- Assisted other departments with transaction processing during staffing shortages

Wells Fargo Bank – Denver, CO

Loan Servicing Specialist 4- Member Syndications Team June 2011- June 2013

- Processed take downs, advances, LC adjustment, rate sets, and conversions on Member, Foreign, and Agency loans
- Processed accounting unit changes, officer changes, payments, advances, and banking requests for Transaction Processing team
- Trained other team members how to properly net letter of credit accounts on Member loans
- Consistently met and exceeded transaction processing accuracy threshold of 99.25%

Wells Fargo Bank – Westminster, CO

Personal Banker August 2010 – June 2011

- Established and retained customer account relationships through everyday branch interactions and tabling events
- Proactively cross-sold a variety of consumer, business, and insurance products and services
- Entrusted to ensure regulatory and compliance mandated activities and tasks were completed on a monthly basis
- Consistently achieved desired sales production while maintaining high customer service satisfaction scores
- Educated customers on services available to them through various Wells Fargo affiliates

Wells Fargo Financial – Northglenn, CO

Credit Manager May 2010 – August 2010

- Analyzed customer's financial profiles to determine if their financial status could use improvement
- Cold called customers to educate them on Wells Fargo Financial products and services and discussed their long term financial goals
- Entrusted to complete financial applications and analyzed credit reports in order to improve customers current financial situations by consolidating debts or refinancing current loan terms

Wells Fargo Bank – Westminster, CO

Teller/Teller Trainer May 2008 – May 2010

- Maintained cash drawer while actively selling Wells Fargo products and services
- Actively trained new tellers to effectively run transactions while ensuring that their monthly sales goals were met
- Ensured that daily work was prepared and shipped to appropriate processing centers
- Consistently met and exceeded quarterly sales goals while maintaining high customer service satisfaction scores

Campus Crest – Evans, CO

Community Assistant/Leasing Agent January 2007 – May 2008

- Educated perspective residents as well as the Greeley/Evans community on up and coming student apartment complex
 - Consistently met and exceeded sales and leasing goals while ensuring all leasing regulations were followed
 - Planned community events to create a branch awareness for current and perspective residence
 - Processed background checks and leasing agreements within internal system to ensure accuracy and efficiency was maintained within leasing office
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Education

University of Colorado at Denver

- Bachelor of Arts in Communication Studies
- Degree acquired May 15, 2010
- Graduated with honors - Cum Laude