

# Albert Sung

Los Angeles, CA 90005

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+1 213 841 6393

Authorized to work in the US for any employer

## Work Experience

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### **Inbound Contact Center Representative**

Answering365 - Los Angeles, CA

November 2021 to Present

- Arranging and confirming appointments on scheduling platforms
- Data dissemination/distribution via email, fax, SMS, etc.
- Dispatching/triaging calls for medical facilities, law enforcement, plumbing vendors, school districts, etc.
- Information capture/verbal relay to clients or contracted vendors

### **Executive Assistant**

TaeTrust, Inc. - Los Angeles, CA

June 2020 to Present

- Generate plan proposals and official documentation for newly-established defined benefit/contribution plans
- Calculate additional tax-deferred amounts that highly-compensated employees may contribute, in adherence to allocation regulations.
- Compile employer-sponsored retirement plan investment and insurance account balances from the recordkeepers
- Correspondence with retirement plan trustees to identify payroll discrepancies and file extensions with the IRS
- Remittance of 401(k) & IRA contributions, and subsequently confirm correct tax-coding of rollovers and qualified transfers
- Complete annual filing with the IRS and distribute Annual Reports

### **Financial Advisor Assistant**

LPL Financial - Los Angeles, CA

June 2020 to Present

- Design in Excel format expected ROI of fixed-income securities/structured products for prospective clients
- Identify optionable stocks to emulate fixed-income performance and loss buffer in 100% equity portfolio
- Design comparative illustrations of compounding return in fixed/variable annuity and life insurance products

### **New Business Coordinator**

Credence Financial Group - Los Angeles, CA

May 2019 to June 2020

- Assist in filing applications for life insurance, annuity, and pension/401(k) plans
- Service existing clients via phone/email correspondence
- Contact carriers via same channels to resolve administrative issues
- Create remittance logs and other records of all transactions

### **Community Economic Development Intern**

Koreatown Youth & Community Center - Los Angeles, CA

January 2019 to April 2019

- Prepared 2018 tax returns for low-income households (VITA)
- Managed client intake/interview procedures
- Appointment scheduling, volunteer online registration, monthly reports, data entry, and site maintenance daily routines
- Referred clients to pro bono legal services
- Assessed eligibility and assisted low-income clients with Tax Time Savings, Gas Assistance, and California Lifeline programs

## Education

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### **B.A. in Linguistics**

UC Berkeley - Berkeley, CA

August 2011 to May 2017

## Skills

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- Linguist experience
- Tax experience (1 year)
- Calendar management (4 years)
- Interpretation (4 years)
- Translation (1 year)
- Customer service (4 years)
- Triage (2 years)
- English
- Office management
- Proofreading
- Analysis skills (4 years)
- Korean (10+ years)
- Personal assistant experience (4 years)

## Languages

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- English - Expert
- Korean - Expert

## Certifications and Licenses

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### **Guard Card**

April 2023 to April 2025

Training Completed & Guard Card issued by CA Bureau of Security and Investigative Services.