

# Frances Lee

Ferriday, LA

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Authorized to work in the US for any employer

## Work Experience

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### **Tax Preparer**

Independent Contractor

May 2017 to Present

- Conduct interviews with clients
- Prepare federal and state tax returns for individuals and businesses in accordance with policies and in compliance with legislation and regulations
- Proved clients with IRS audit support
- Search for deductions and credits for clients
- Provide printed copies of returns for clients to review
- Provide tax support
- Active IRS certified PTIN
- Expert knowledge of the constant changing federal and state tax laws
- Experience with Quickbooks

### **Loan Officer Assistant/ Sales Support Specialist**

American Financial Resources, Inc. - Remote

June 2021 to August 2022

- Answering high volume inbound calls, asking probing questions to understand the customers' questions and concerns
- Connecting customers to licensed loan officers who are eligible for financing
- Assisting loan officers with daily activities including following up with leads, sending and responding to emails from customers
- Ask probing questions to determine if potential buyers are eligible for mortgage financing
- Mortgage knowledge of VA, FHA, USDA, Conventional, And ARM mortgages
- Managing customers files and updating when necessary
- Knowledge of the mortgage program Encompass
- Adhere to policies and confidentiality with sensitive information
- Ability to empathize with customer
- Ability to multi-task (i.e. talking and typing simultaneously)
- Organizational and time management skills
- Proficient in Microsoft Office (Word, Excel, Outlook) and basic internet skills
- Professional verbal and written communication skills
- High degree of initiative, mature judgment and discretion
- Ability to navigate through multiple systems
- Provide administrative support to the different departments such as handling clerical duties

- Contacts relevant parties to collect necessary documentation and information under little to no supervision
- Assist in reviewing and preparing loan packages
- Support the organization by assisting with any additional responsibilities

### **Customer Service Representative**

Alorica - Remote

February 2019 to July 2022

- Answer high volume inbound calls and assisting with any questions and concerns members may have with their Medicare plan or claim
- Data entry; customer intake for Medicare
- Documenting customers' interactions while navigating through multiple systems to research answers quickly
- Explain in-home visits and set up appointments with evaluators
- Assist with ordering medical products for members
- Explaining Medicare benefit coverage, benefit extensions, answering open enrollment questions, documenting, and researching claims
- Effectively listening to members and determining the best course of action.
- Ensure members' personal information is correct in system
- Downstream for members ensuring that all questions and concerns are resolved at the end of the call
- Demonstrate strong listening and interpreting skills
- Demonstrate strong work discipline ethic with little to no supervision
- Empathize with customers and calmly attempts to resolve and de-escalate any issues
- Credit card authorization
- Accepts constructive criticism
- Upsells to customers as necessary while using scripted and non-scripted rapport

### **Quality Mortgage Operations Specialist**

JPMorgan Chase

January 2011 to October 2016

- Completed chain of title for allonges by contacting 3rd party businesses and individuals
- Insured loans
- Documentation review for accuracy
- Verified completeness of VA and FHA binders by reviewing documents such as the note, appraisal, deed of trust, assignment, etc.
- Built and maintained rapport with management, peers and clients
- Demonstrated exceptional verbal and written communication, as well as telephone etiquette
- Ability to think independently and multi-task in fast paced environment
- Met intense deadlines while working under pressure
- Assist in collecting missing documentation for completion of loan file from borrowers
- Work with the processor in collecting documentation to clear Loan Officer conditions
- Update Loan Officer on status of conditions and copy Loan Officer on correspondence and requests for documentation
- Prepare file for processing
- Perform office functions such as taking phone calls, scheduling meetings for loan officer, faxing, making copies
- Provide overall backend support to the Loan Officer as needed

## **Receptionist/Assistant Loan Officer**

Concordia Parish School Employees' - Ferriday, LA  
June 2005 to August 2010

- Answer multi-line telephone and transfer calls to appropriate department
- Bookkeeping
- Faxing and filing documents
- Operating basic office equipment (fax machine, copy machine, computer, printer, etc)
- Process loan requests
- HR and Payroll
- Collections

## Education

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### **Master's Degree in Business Administration**

Western Governors University  
February 2018 to March 2019

### **High school diploma or GED**

## Skills

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- Fair Housing Regulations
- Phone Etiquette
- Tax Experience
- Loan Officer Experience
- Detail Oriented
- Self Starter
- Team Player
- Reliable
- Consistent
- Customer Service
- Live Chat
- Loan Processing
- Interpretation
- Administrative Experience
- Sales Support

## Assessments

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### **Retail customer service — Highly Proficient**

May 2022

Responding to customer situations in a retail setting

Full results: [Highly Proficient](#)

## **Inside sales — Highly Proficient**

May 2022

Understanding and responding appropriately in sales scenarios, and performing common sales calculations

Full results: [Highly Proficient](#)

## **Typing — Expert**

January 2023

Transcribing text

Full results: [Expert](#)

## **Basic computer skills — Highly Proficient**

January 2023

Performing basic computer operations and troubleshooting common problems

Full results: [Highly Proficient](#)

## **Administrative assistant/receptionist — Proficient**

January 2023

Using basic scheduling and organizational skills in an office setting

Full results: [Proficient](#)

Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.