

Matthew A. Gomez

123 Channel Drive • Point Pleasant, NJ 07750 • 732.555.5555 • mattgomez@ureach.com

OPERATIONS AND SYSTEMS PROFESSIONAL

Business Operations ~ Supervision

Results-driven and well organized *Operations Professional* with experience and demonstrated accomplishments developing corporate growth, stability, and financial performance. Excellent problem solver with strong general management skills. My work performance reflects initiative, endurance, and the ability to relate to a wide range of people.

Expertise in identifying trends and correcting problems and procedures. Maintain superior client relations through diligence, follow-up, and being responsive to the customer's needs.

Competencies Include:

- Operations Management
- Financial Reporting & Analysis
- Financial Services
- Budgetary Functions
- Training and Development
- Sales
- Budgeting
- Business Management
- Client Relations
- Project Management
- Investment Strategies
- Portfolio Management

Professional Experience

Principal Financial Network, Shrewsbury, NJ (2001 - Present)

Financial Representative

Provide insurance and investment solutions to a diverse client base in areas of retirement planning, disability insurance, life insurance, long term care, and mutual funds.

- Develop financial planning strategies to meet individual client's needs; relying upon excellent research skills and an intuitive sense regarding equities and the market.
- Create customized investment programs designed to meet retirement or educational goals.
- Work as part of a team with veteran agents and product specialists selling multiple products to businesses or individuals.
- Responsible for total sales process from initial contact to closing contracts.
- Utilize contact management software to update client files and records.
- Achieved **top sales status for the most new clients and premiums in the District, December 2002. The District was comprised of 4 agencies and 114 representatives.**

Datek Online, Jersey City, NJ (2000 - 2001)

Order Room Analyst

Managed the Order Room and processed online trades of NYSE and NASDAQ listed securities.

Responsible for a 6 person team handling daily volumes that exceeded 100,000 shares per day, ranking Datek among the top 3 online services.

- Set company records for order volume traded, and quantity of new funded accounts.
- Assisted customer service representatives completing sales trades for customer's accounts.
- Negotiated best trade prices with market makers on the various exchanges increasing profit margins for customers and the company.
- Provided teambuilding, mentoring, and cross-training of personnel; developed the Order Room team into a cohesive unit.

Merrill. Lynch. Pierce. Fenner & Smith Inc., Savannah, GA (1998 - 1999)

Financial Consultant

- **Selected for participation in Merrill's two year *Professional Development Program*. Received intensive training and rotations in stocks, bonds, mutual funds, and other investment instruments.**
- Assisted clients in creating and implementing financial plans for attaining their investment objectives.
- Built strong relationships with clients, monitored their investments, and suggested changes to the portfolio as needed.

Education

Clemson University - Clemson, South Carolina 1991-96

Fairleigh Dickinson University - Madison, New Jersey 1997-1998 (BA - Marketing)

Graduate of **The Dale Carnegie Sales Training Course**

Licenses

Series 7 - General Securities Representative Examination

Series 66 - Uniform Combined State Law Examination

Life, Health, Accident, and Sickness Licenses

Computer Skills and Interests

Microsoft Word, Excel, PowerPoint, and Outlook, the Internet, and ILX

Board of Directors - Ocean Club Towers - Vice-President

Tom L. Fritsch Memorial Golf Tournament - Committee Member