

# Matthew A. Gomez

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## 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 (2011 - 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 2012. The district was comprised of 4 agencies and 114 representatives.**

#### ***Datek Online, Jersey City, NJ (2010 - 2011)***

##### **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 (2008 - 2009)***

##### **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 2001-2006

**Fairleigh Dickinson University** - Madison, New Jersey 2007-2008 (**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