

Wendy Del Monte

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SUMMARY

I am seeking a role where I can effectively apply my 12+ years of experience, having worked passionately within Operations Management. My duties have ranged from system development, administrative assistance, client relations, management, and more. I possess a wide base of knowledge and skills including spreadsheet reporting, data migration, training & onboarding, as well as overall business development. With a unique management style and developed skills in leveraging relationships with colleagues and vendors in order to execute my duties in a professional manner. I take pride in being a leader and team player with true interpersonal skills & wish to establish honorary relationships with the people I work with.

PROFESSIONAL EXPERIENCE

Hanna Insurance and Financial Services

Operations Manager / Executive Administrative Assistant

Administrative Assistant/Underwriting Specialist

Concord, CA

Feb 2005 – Present

Aug 2004 – Jan 2005

- Lead in interviewing, hiring, training and oversight of team; Monitoring Company and employee productivity
- Carried organization through crisis state; in-taking 400+ underwriting applications on monthly basis while hiring to meet demand
- Life Insurance and Annuity processing with clients from applications to placing case/ Servicing client's needs after case is placed
- Create Plan Documents, Payroll Forms, RFP's, and mass mailings to clients to provide awareness of their eligibility
- Sent bi-weekly mailing which entailed v-look ups from a variety of spread sheets to import information from 48,000+ employees
- Developed extensive monthly, quarterly, annual and commission reports to track progress and trained teams to adjust to changes
- Established a Process Document which encompassed the processes and steps with instructions for all roles within the company
- Oversaw data migration from 3 CRM Platforms (Saleslogix to Gen 4, Gen 4 to Sales Force, and Sales Force to Redtail)
- Monitored company's governance and FINRA compliance in order to ensure up to date industry standards
- Organize and coordinate logistics with State Appointments for 3 Financial Advisors in 49 states with 5 carriers

Jeff Oster | Raymond James

Office Manager / Administrative Assistant

Los Angeles, CA

May 1999 – Aug 2004

- Adeptly handled administrative matters including screening calls, managing calendars, and planning meetings
- Interacted professionally with all levels of staff and maintained the highest level of confidentiality; handled sensitive issues
- Organized travel arrangements, composing documents and organizing offices for efficiency
- Provided customer service; processed Life and Annuity Applications and oversaw underwriting and placement of cases

EDUCATION, SKILLS & INTERESTS

Licenses: Life & Health Insurance License

Technical: Microsoft Office (Word, Excel, Outlook), Saleslogix, Gen 4 and Salesforce

Core Competencies: Data Management, Office Management, Customer Service, Underwriting, Administrative Assistance

Interests: Dancing, Hiking, Kayaking, Volunteering, Outdoors Activities, Social Networking

LinkedIn: [linkedin.com/in/wendy-del-monte-61619a143](https://www.linkedin.com/in/wendy-del-monte-61619a143)