

Rosabell Sheed

Registered Sales Assistant

Profile

Results-driven Registered Sales Assistant with 1 year of experience in providing exceptional support to financial advisors and clients. Proficient in CRM systems, trade execution, and account management, while maintaining strict compliance with industry regulations. Adept at fostering strong client relationships and efficiently resolving inquiries, demonstrating excellent communication and organizational skills. Committed to continuously expanding financial knowledge and contributing to the overall success of the team.

Employment History

Registered Sales Assistant at Edward Jones, SD

May 2023 - Present

- Successfully managed a portfolio of over \$50 million in client assets, resulting in a 20% increase in revenue for the branch in 2019.
- Streamlined communication processes between clients and financial advisors, leading to a 30% reduction in response time and a 15% increase in overall client satisfaction ratings.
- Implemented new CRM software, improving client data accuracy by 25% and reducing manual entry errors by 40%, which contributed to more efficient and personalized client services.
- Assisted in the onboarding and training of two new sales assistants, resulting in a smoother transition and a 10% increase in team productivity within six months.

Junior Sales Assistant at Wells Fargo Advisors, SD

Jul 2022 - Mar 2023

- Increased client base by 15% within the first year by actively prospecting and networking in the community, resulting in an additional \$2 million in assets under management for the team.
- Successfully exceeded quarterly sales targets consistently for all four quarters, achieving an average of 125% of assigned goals and contributing to the overall growth of the team's revenue by 10%.
- Streamlined client onboarding process, reducing the average time taken by 20%, leading to increased client satisfaction and a 5% improvement in client retention rates.

Education

Associate of Applied Science in Business Administration with a focus on Sales and Marketing at Southeast Technical College, Sioux Falls, SD

Aug 2018 - May 2022

Relevant Coursework: Marketing Principles, Sales Techniques, Consumer Behavior, Advertising and Promotion, Digital Marketing, Business Communications, Market Research, Retail Management, and Brand Management.

Certificates

Details

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Links

[linkedin.com/in/rosabellsheed](https://www.linkedin.com/in/rosabellsheed)

Skills

Salesforce proficiency

Cold-calling expertise

Relationship-building

Product knowledge

Upselling techniques

Microsoft Office mastery

Time management

Languages

English

Indonesian

Hobbies

Organizing community events

Practicing yoga and meditation

Creating digital art and graphic design