# Luis Ramirez

Financial Services Representative

luis.ramirez@email.com
(602) 555-0157
Phoenix, AZ
linkedin.com/in/luisramirez

## SKILLS

- Customer Service
- Sales
- Account Opening
- Loan Applications
- Cash Handling
- Cross-Selling
- Online Banking Support
- Microsoft Office
- Problem-Solving

## EDUCATION

**Associate of Arts** 05/2022
Phoenix College Phoenix, AZ
Business

## CERTIFICATES

**Notary Public Commission**
11/2024
Arizona Secretary of State

## SUMMARY

Financial services representative with 2 years at a Phoenix credit union and 2 years of customer service in retail sales. Opens accounts, processes loan applications and handles cash handling and member transactions, matching each member to the right product. Brings problem-solving and a calm, bilingual English and Spanish approach to busy branch days.

## EXPERIENCE

### Financial Services Representative

08/2024 - Present

Copper State Credit Union — Phoenix, AZ

Credit union with 110,000 members and 15 branches in Maricopa County.

- Handle account opening for 20 new members a month, including checking, savings and youth accounts.
- Process auto and personal loan applications, submitting **$640K** in funded loans in 2025.
- Resolve member issues with card holds, transfers and online banking access, fixing 85% on first contact.
- Exceed monthly cross-selling goals by 12% on average, mostly credit cards and share certificates.

### Customer Service Representative

06/2022 - 07/2024

Camelback Wireless — Phoenix, AZ

Independent phone and accessory retailer with 5 stores.

- Sold phone plans and accessories, finishing 2023 at **108%** of the store sales target.
- Answered billing and device questions for 40 customers a day in person and by phone.
- Balanced the register at each closing shift, keeping cash handling errors under $10 a month.
- Signed up 25 customers a month for device protection plans, the second-highest rate in the company.