

Mr. Brandon K. Bell  
1109 Eaglewood Drive  
Virginia Beach, Va 23454  
Phone: (757)608-5011  
[Brandonbell037@gmail.com](mailto:Brandonbell037@gmail.com)  
<https://www.linkedin.com/in/brandon-k-bell-08344b315>

**Career Objective:**” Thank you for reviewing my resume. Over my career, my objective has been to be a collaborative self-starter who has a proven track record of success and setting the standard for my colleagues; in a remote and client facing environment.

A detail-oriented proactive and compassionate driven client relations specialists, engaging in strong communication, listening and problem-solving skills. A high level of attention to detail and a passion for providing services and a relationship builder with skillsets introspecting, growth in expansion of enterprise accounts.

## ***Education, Honors, and Certifications***

### **Advance Diploma**

Ocean Lakes High School

Advance Diploma and Advance technology center, 1999-2003 GPA 3.85

### **Associates in Business Administration**

Tidewater Community college Virginia Beach, VA

2006-2009 GPA 3.87

### **Major Business Administration**

B.A. of Science in Business Administration

Old Dominion University/ Undergraduate

2013-2015 3.87

### **Skills**

Strong leadership and team management abilities

Excellent communication and negotiation skills

Analytical mindset with data-driven decision-making skills

Strategic thinking and problem-solving abilities.

Proficiency in Microsoft office, Microsoft Teams and workday

Excellent in Microsoft Office, Excel, Word, Power point, outlook

Expert in sending and receiving e-mails

Strong problem solving skills and critical thinking skills

Excellent in faxing through computer, Microsoft Windows 10 XP, Type 45 wpm

Exceptional with spreadsheet, Detail oriented, thorough revision skills

Ethical, Superior written skills and communication skills

## ***Employment***

Treasury transfer customer service lead/ remote

BNY Mellon New York Bank Treasury transfer/customer service

-June 2024-March 2025

Demonstrate ability to assist with clients stock shares for investing purposes financial security

responsible for assisting the clients and team leads

Assist Team in promoting and selling private equity securities, maintaining relationships with investors

providing detailed information about equity offerings, and collaborating closely

Provide assistance with marketing and sales teams to ensure accurate communication with investors.

Involved in conducting in-depth research, analyzing finances for clients

*Seeking growth opportunities for someone with background in investments and wealth management to increase my career knowledge. Able to identify analyze and propose solutions to various consumer's and interpret technical concepts for business support. Exceptional team player with personal skills. The ability to translate technical concepts in business terms. "*

#### **Advisor Group**

Advisor Support  
2020-2023/remote

Demonstrate the ability to reach decisions promptly  
And implement appropriate action.  
Demonstrate ability to work with Workday and payroll  
Payroll experience in the United States, Canada and Puerto Rico  
Educate client where to find information related to topic  
Customer service support for investment, investors, and wealth Advisor  
Navigating user interface NetX 360 to provide clients solutions  
Researching 401k investments Roth IRA financial investments credentials.

#### **Diamond international**

2020-2022/Virginia Beach  
Timeshare Specialist

- Prospecting clients ushering them to the best property to serve there family needs
- Managing clients paperwork concerning timeshare
- Giving clients a great experience and excellent customer service
- Using services to track and clients future properties for best value.

#### **Checkered flag**

2018-2020/Virginia Beach  
Product specialist

- Prospecting clients through various marketing techniques
- Managing clients vehicles availability
- Using products such as dealer track and true car.
- Generating a book of business to promote Checkered flag

#### **Priority**

2017-2018

Product specialist

- setting up new clients with the right vehicles for the best value for inquiring customer
- Managing and routing customers to the right service provider
- Demonstrating excellent customer service by thoroughly answering all customers essential question and concerns
- Diffusing and deescalating irate customers
- Explaining in detail potential sales goals and promotions, equipment, and packages customers may qualify for with vehicles

#### **Capital Group**

Financial representative  
2013-2016/Virginia Beach

Prepared financial statements for financial advisor and broker dealers  
Assess and evaluated mutual funds, 401k investments and 529's into correct funding subsidiaries  
Followed investment procedures for client to receive accurate funding for investment transactions

Billing specialist for Capital Group project and processing concerning clients from financial services.

Assist with the review and coverage for daily and periodic accounting responsibilities, including determining the daily net asset value of one or more mutual funds in the American Funds.

**References** Upon request

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