

WILL WELCH

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Qualifications

- Fifteen years in customer service and phone sales
- Ten years of Management.
- Five years' experience as a company trainer and mentoring.
- Seven years in direct sales responsible for large geographical territory.
- Life & Health licensed in the State of Utah.
- Mortgage license NLMS#1447868 licensed in 17 states can provide list upon request.

Skills

- Proficient in hiring, training, and coaching
- Strong background in visual display and point of sale presentation
- PowerPoint, Excel, Word Microsoft, Morningstar, Naviplan and various CRM Systems, Encompass, BYTE.
- Strong public speaker-motivational
- Questioning thinker, problem solver
- Strong Spanish background

Experience:

Loan officer for eight years – Assistant Manager of phone center and training of new loan officers. Reviewed of credit loan processing and pre-underwriting of client files. Help clients understand loan process. 2001 to Present

International Business and start-up five years - Review and implement projects and interface with bankers and investors. Negotiate contracts with contractors, vendors, and subcontractors. 1996 to 2001

Insurance Sales 6 years- Direct marketing and help clients find the products that suit their needs. Prepare financial needs analysis for recommended insurance products. Held 6, 63 and 65 securities licenses. 1994-1996 & 2005 -2008 2014- present.

Later Day Saint Mission for two years - Toronto Canada English/Spanish speaking. Christian volunteer and missionary assisted members and non-members in various teaching situations. Held various leadership positions.

Education

- **Utah Valley University**, Orem, Utah – August 2011- BS Personal Financial Planning Degree
- **US Navy**-(1987 to 1991) Attended Quarter Master A school graduate, Nuclear Weapons Handling School. Honorable discharge. Hazardous material handling school USN.
- **Utah Army Guard 19th Special Forces** UTD translation project. 1991 – 1996 Honorable discharge.

Henry Ford: *Whether you think you can or whether you think you can't, you're right!*