Isaiah Souza

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SALES EXPERIENCE

Senior Financial Assistant **May 2021 - July 2021**
Bangerter Financial *Roseville, CA.*

- Managed operations and marketing CRM's to assist Jeffrey Bangerter in his sales production by following up on his prospects, delegate follow up to other team members.
- Answered basic questions and set appointments during product seminars for livestream audience.
- Prospected above and beyond expectations: warm leads and CPA centers of influence for referrals for Private Equity investments.
- Made 40 outbound calls and sent 15+ personalized emails per day soliciting to Jeffrey Bangerter's existing clients, prospects, and referral partners.
- Sought constant feedback and constructive criticism from other team members and manager to improve performance and achieve sales goals.

Financial Advisor **January 2021 - April 2021**
MassMutual Financial Group *Roseville, CA.*

- Prospected and solicit consumers and businesses in communicating vision and value of practice - averaged 60 outbound calls / 30 emails / 25 personalized LinkedIn sales navigator messages per day.
- Implemented the Financial Planning process in all of my discovery / demo calls selling the benefit of a long term relationship with me as a financial advisor giving comprehensive fiduciary advice.
- Created strategic social media and marketing campaigns (DRIP campaigns, Facebook Ads, Webinars).

Client Service Specialist **June 2020 - Nov. 2020**
Violetta Terpeluk - Ameriprise Franchise Owner *Roseville, CA.*

- Presented in client meetings proposals and relayed key information on their accounts / policies.
- Responsible for following up on marketing leads, referral opportunities, and new business from lead generation sources (DRIP campaigns, newsletters, LinkedIn, Webinars).
- Took and placed money movement and trades orders from clients consisting of stocks, bonds, & ETF' s.
- Proactively researched and resolved all client service, new business, technology, and paperwork issues.

Life insurance Agent **Sept. 2013 - June 2020**
Bocceri, Board, Higgins, and Kitz *Sacramento, CA.*

- Serviced and prospected a book of business August, 2018 until June 2020 under the mentorship of Fredric Bocceri and Robert Kitz (80 years combined experience in the financial advising industry).
- Identified needs for financial products and design product according to client's individual situation, created and applied recommendations.
- Communicated product design and function to client via email, marketing ad, public talk, and social media posts.
- Participate in weekly and monthly networking meetings and events creating Centers of Influence and referral partners, generated 2-4 leads a week for Group Health Plans, Life, Annuity, and Long Term Care lines of business.
- Created marketing campaigns and lead generation systems to create a stream of leads.

EDUCATION

Sacramento State University **Spring 2019**
Major: BS in Economics *Sacramento, CA.*

LICENSES

Series 7 Securities License Received: February 2019
Series 66 Securities License Received: May 2020

PROFESSIONAL SKILLS

- Customer success: Issue resolution via phone / in person / email, professional and personable demeanor, excellent writing and phone presence skills.
- Marketing and CRM: LinkedIn Sales Navigator, SalesForce, Hubspot, Redtail, Hearsay Social, and SmartOffice.
- Sales skills: Presentation of brand, empathetic consultive services and financial products, overcoming objections, and budget implementation.