

Carrie Ann Killingsworth
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QUALIFICATIONS SUMMARY

Team player with independent spirit - Ten years in the financial services environment - Extensive knowledge of relationship building, account management, customer service & sales - Excels in working within various team structures - Thrives in fast-paced environment - Quickly understands new techniques, products, and services - Talented at building both internal and external relationships.

EXPERIENCE

Management

Successfully increased organization's Operation Feed fundraising campaign by 150% from previous year.

Coordinated on-site activities between Security, First Aid, onsite Paramedics and on-site police officers for non-profit organization's annual four-day event.

Supervised security shifts during four-day event with over 50,000 attendees.

Service

Reviewed and coordinated new pension case transition from proposal to sold case status
Addressed post sale service issues, including performing corrective processing or research, as needed, on service issues.

Acted as a liaison between home office and business partners on service issues.

Consistently recognized by internal and external clients as providing excellent service.

Sales

Coordinated pricing and special pricing situations to facilitate sales of retirement plans

Facilitated conferences calls with various internal and external partners to increase sales

Advised Waddell & Reed Financial Advisors on the capability of, appropriateness of, and procedures in employing Nationwide annuity products in financial planning situations.

Exceeded territory production goals

Provided illustrations, sales material, and other tools to assist agents in increasing sales.

Training

Created annuity conference call program to educate Waddell & Reed Advisors and increase annuity sales.

Identified training issues and assisted with the training of team members.

Recruited, supervised, and trained, with other security committee members, 400 volunteers for non-profit organization's four-day event

EMPLOYMENT

Case Acquisition Specialist, Private Sector Retirement Plans,
Nationwide Financial, September 2006 – present

Sr Analyst, Internal Sales & Service, Waddell & Reed Sales and Service Team,
Nationwide Financial, December 2000 – August 2006

Annuity Representative, Annuity Call Center,
Nationwide Financial, October 1998 - December 2000

VOLUNTEER

Red Cross of Greater Columbus, Columbus, Ohio
January 2007 – current

Security Supervisor, Community Festival, Columbus, Ohio
June 2000 – June 2004

EDUCATION

Mount Vernon Nazarene University, 2007, *Bachelor of Business Administration*

LOMA, Pursuing *FFSI (Fellow, Financial Services Institute) designation*

State of Ohio, *Accident, Life, Health & Annuity License*

National Association of Securities Dealers (NASD), *Series 6 License*

US Army Medical Center and School, San Antonio, Texas, *Pharmacy Technician Certificate*

MILITARY

US Army, Pharmacy Technician, Specialist E-4, Honorable Discharge