

## Michelle Lum

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555, NE Shore Drive  
Portland, OR

### Summary

Hardworking Financial Services Customer Service Representative with 10+ years' experience providing patient, compassionate customer service. Strong knowledge of Adjustable Rate Mortgage Indexes, Principal and Interest type loans, and the escrow process with regard to insurance, taxes, and escrow analysis. Won multiple awards for providing outstanding customer service. Strong ability to both get along with coworkers and work independently. Diligent, organized, and thorough. Additional expertise in handling the following:

- New Customer Calls
- Year End 1098 Tax Information
- Rate Change Information
- Requests for Copies of Documents
- Account Balance and Payment Verification
- Payment of Taxes and Insurance
- Missing Payments
- Vendor Contact

### Highlights of Achievements

Consistently provide service to 250 to 300 customers per day

- way above department average of 200 customers per day.

Known as the one who can be relied on

- to solve customer service issues, leaving both customers and bank management satisfied with solutions provided.

Act as resource to coworkers Act as resource to coworkers Act as resource to coworkers

- on bank policies and procedures after completing thorough study of procedure manual outside of work hours.

### Professional Experience

Kennedy Financial Services Group, Hillsboro, OR

2008 to Present

#### **Customer Service Representative**

Earned "employee of the month" customer service award on numerous occasions. Respond to incoming calls and qualified written requests. Handle customer inquiries pertaining to mortgages and consumer loans.

Respond to customer inquiries and needs, providing quality customer service.

US Bank of Oregon, Portland, OR

2005 to 2008

#### **Customer Service Representative, Commercial Markets Service Representative, Commercial Markets Service Representative, Commercial Markets**

Represented and supported all Oregon Commercial Markets at Oregon Emergency Operations Center for Y2K event management. Monitored system through Y2K. Tested each system for functionality to make sure it transferred over from 1999 to 2000. Utilized understanding of all aspects of normal business operations, contingency planning and operations, as well as critical system requirements and dependencies of each individual commercial market.

US Bank of Oregon, Portland, OR

2002 to 2005

#### **Customer Service Representative, Teleservicing Center**

Provided general account servicing and problem resolution to banking clients. Received and responded to clients via telephone regarding bank products and services. Researched and maintained accounts. Prepared debits/credits for service charges and/or reversals. Substituted for production officers in absence as needed.

### Education

Mt. Hood Community College, Portland, OR

2002

A.S. in Business Administration/Accounting

### **Recent Professional Development Coursework:**

- Top Customer Service Skills for Top Customer Service Representatives, SkillPath Seminars, 2004
- Communicating Successfully with Difficult People, Portland Community College, 2003
- Microsoft Word I and II, Portland Community College, 2003
- Microsoft Excel I and II, Portland Community College, 2002

### **Computer Skills**

Word, Excel, PowerPoint, Access, and various proprietary software applications.

### **Professional Affiliations**

~~Professional Customer~~ Service Association