

# DANNY J MORALES

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469-744-2741

## EXPERIENCE:

**Sr. Personal Finance Assistant, K-Force staffing agency, InTouch Credit Union Temp Associate**  
Plano, TX February 2018- April 2018

- Professionally provide first call resolution by assisting members and potential members with telephone requests, online banking, payments, update account information, auto loan rates, products and services
- Identify cross-sell opportunities based on the customers financial needs, auto loan, home loan, home equity loc, cd's, credit cards, and bank accounts
- Originate loan applications and contact members to relay loan decisions, Interpret credit bureau information received in reference to applications
- Contact perspective members, businesses, and select employer groups to present information on available products and services

**Bilingual Software (S) Voice Tester, Samsung Electronics of America / World Link (Contract 8 months)**  
Richardson, TX May 2017-December 2017

- Part of the research and development team that required high confidentiality to test Samsung's new voice recognition software named Bixby that is now out to the public
- Spoke to Bixby with hundreds of commands daily on different applications such as gallery, camera, Facebook, Uber, Samsung music, and notated results where improvements needed to be made
- Worked individually and as a team in a fast paced environment to complete hourly, daily, and weekly deadlines with minimal supervision
- Responsible for logging and maintaining daily records with multiple phones tested on, usually 4-5 devices with their software versions, app versions, sim cards, and carrier on the device (Verizon, AT&T, T-Mobile, and Sprint)

**Net Promoter (Escalations), Capital One Bank**  
Plano, TX September 2015-May 2017

- Act as a liaison between branch staff and back office support on operational issues through direct phone support (Inbound / Outbound calls)
- Knowledgeable with all systems to solve and search for data including (ACH warehouse, Online Banking, Mobile App, Wallet App, Bill Pay, External Transfers, Apple Pay set up, Quicken/QuickBooks)
- Tailoring each conversation with every customer by offering options and a solution for an increase in our customer satisfaction surveys
- Establishing trust with my job knowledge and relaying information in an understanding manner for an effective One Time Call Resolution

### **Online Banking Technical Support Specialist, Capital One Bank**

Irving, TX, July 2014-September 2015

- Addressed technical issues concerning financial management products such as Quicken/QuickBooks, Apple Pay, and Digital Banking platforms by troubleshooting to determine root cause for a one time resolution (Inbound calls)
- Solved for technical issues varying from device specific, application issues, and network connectivity variance
- Work in a high call center volume, multitask, and navigate through a dozen systems (Touch Point, Iris, Issuer Direct, Extra, Partner Care, RSA, Compass, etc.)
- Formulated communication styles and tailored conversations to educate customers banking products, services, and enhancement features

### **Bilingual Teller- Financial Services, Worthington National Bank**

Irving, TX, August 2013- May 2014

- Displayed ability to answer questions regarding bank services, products, and follow procedures while maintaining the brand of excellent customer service
- Authenticated currency, reason to doubt collectivity, and determined funds availability following Regulation CC policy
- Fulfilled Currency Transaction Reports (CTR) and escalated any Suspicious Activity via (SAR)
- Accurately processed customer cash, check, and statement transactions

### **Western Extrusions, Machine Operator (Seasonal - Temporary)**

Irving, TX, January 2013- June 2013

- Operated computerized saw machinery in a timely and consistent manner to provide the best quality extrusion
- Reviewed production and operating reports to resolve operational and maintenance issues to ensure minimum costs
- Results oriented and enthusiastic about developing continuous improvement projects
- Upheld a safe and clean working environment by complying with policy and procedures while applying strong attention to detail to avoid legal action

### **SKILLS**

8+ years of customer service  
3+ years banking  
Bilingual (Spanish, English)  
Multitask

Self-motivated  
Logical  
Analytical  
Adaptability

### **EDUCATION**

#### **Newman Smith High School**

Carrollton TX, - High School Diploma

#### **Brookhaven College**

Farmers Branch, TX - Business management, some college credits