

# Patrick Sorenson

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## ❖ MAJOR ACCOMPLISHMENTS

- Designed and implemented new quote delivery system for emailed mortgage quotes which increased process efficiency by 40%. (ELOAN - 2007)
- Established new business lead generator workflow process that increased client response time by 50% and increased our sales conversion rate by 20%. (Steve Almeida Insurance Agency - 2007)
- Selected as "MVP" for client services numerous months as representative with the highest accuracy and quality statistics. (AIM Investments - 2001-2003)
- Served as a technical writer and project manager for largest financial company software conversion. (AIM Investments - 2001-2003)
- Exceeded monthly sales quota by at least 25% each month during my employment. (Dell - 2000)

## ❖ PROFESSIONAL EXPERIENCE

**Independent Options Income Trader:** Austin, Texas (06/2008 – Current)

- Implemented several options strategies to capture monthly premium from option decay.
- Adjusted positions depending upon several indicators including market direction and volatility.
- Traded profitable at a rate of 85% of all trades.

**Round Rock Independent School District:** Round Rock, TX (02/2008 – 05/2008)

### Substitute Teacher

Worked as a part-time substitute teacher while attaining teacher certificate. Substituted over forty days in various subjects from 6<sup>th</sup> through 12<sup>th</sup> grade.

**E-LOAN:** Round Rock, Texas (07/2007 – 01/2008)

### Loan Consultant

Account executive at the industry leading online mortgage company. Worked closely with customers to ensure that their questions and loan files are processed quickly and efficiently.

- Analyzed a credit package quickly, including calculating income and ratios and determining additional information required for loan approval.
- Positioned loan products and provided financial advice tailored to each customer's goals and timeframe.
- Managed loan through underwriting process and ensured accurate completion through collaboration between several departments.
- Developed new mortgage and communication tools that increased consultants time management.

**Steve Almeida Insurance Agency – Farmers Insurance:** Austin, Texas (01/2007 – 06/2007)

### Insurance Producer

Managed office for an insurance agent. Assisted individuals and companies in selecting insurance coverage to meet their needs.

- Consulted with prospects and explained features and merits of policies offered via the internet, telephone, and direct contact to obtain relevant information for insurance quotes and policies.
- Responsible for processing of paperwork and maintaining client accounts.
- Developed client checklist system that streamlined new client process. This significantly decreased the time required to meet with a client and decreased errors during the closing process.
- Created insurance comparison worksheet that greatly helped in potential client procurement.
- Developed and programmed agent website, advertising flyers, door hangers, and business cards.
- Revamped client contact system using Microsoft Outlook.
- Obtained Property and Casualty Insurance License.

*"He literally did everything for me, he immediately streamlined the business that I had been doing for over 10 years and allowed me to be more efficient and productive than ever."* Steve Almeida, Agent.

**Independent Financial Markets Futures Trader:** Austin, Texas (03/2004 – 04/2007)

### Self-Employed Futures Trader

Traded to make a profit by predicting market moves by buying multiple financial instruments and managed the positions using technical analysis.

- Forecasted market moves using extensive technical analysis.
- Back-tested market indicators to determine accuracy.
- Extensive record keeping and reporting for trend studies and tax reporting.

**AIM Investments:** Austin, Texas (11/2000 – 01/2004)

#### **Client Services Team Leader**

Provided service for a leading mutual fund company in the global market. Responsibilities included providing client services for both internal departments and direct and indirect company customers.

- Helped manage a team of service representatives. Responsibilities included training, verification of financial transactions, archiving of phone logs and supporting documents, handling escalated issues with follow through until successful resolution. Processed account adjustments and verified team member's adjustments.
- Selected as a project manager of a system conversion team for the largest financial company software system conversion to ever take place in the industry.
  - First to test and debug the system.
  - Served as a technical writer for policies and procedures for new software for entire company.
  - Served as liaison between software vendor and AIM.
  - Assisting in implementation, testing, and training for actual conversion.
- Served as a member of a mentor and training team in charge for training all new hires.
- Selected by management as a 'top representative' and cross-trained in other departments to become a cross-department representative.
- Selected to attend job fairs and do impromptu interviews for potential job candidates.
- Reached highest promotion levels in the earliest required time periods.
- Obtained securities license series 6.

*"Patrick does a great job of helping out his teammates and is always on top of not only his personal items but also those for the whole team. I see Patrick as a leader on the floor and the 'go to' guy for both teams and I hope that other reps appreciate all the assistance he provides."* Kyle Coke, former AIM supervisor

**Dell Computers:** Round Rock, Texas (02/2000 – 09/2000)

#### **Small Business Salesman**

Trained as inside sales representative for the industry leading computer company. Fielded approximately fifty sales calls a day and informed and quoted clients on over forty thousand products available.

- Responsible for probing client's current and future computer needs for the purpose of finding new clients eligible for a relationship client sales account.
- Cross-trained in several departments including warranty services and internet sales and served as an emergency reserve representative in these departments.
- Served as peer mentor helping to ramp up new agents by training them on software, workflow, and product knowledge.

#### **OTHER EXPERIENCE**

- Operated Austin Arcade Guys, a small business that restored classic arcade games for resale.
- 6 years of experience in the food and beverage industry from waiter to manager.
- Designed and programmed several websites, including e-commerce sites.

#### **❖ EDUCATION**

**Bachelor of Arts Economics 1999**

**Minor in Business Administration**

University of Texas at Austin - GPA 3.44

**Alternative Teacher Certificate Program** (Completed July 2008)

ITeachTexas.com

**Multi-Media Specialist Certificate Program** (Completed July 2008)

220 hour course covering Adobe software used in Web media.