John Lattimore

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10+ years of success in customer service and financial services. Customer-centric with outstanding listening and communication skills leveraged to guide diverse customers with a wide range of goals.

Licenses:

- Property and Casualty License **August 2025**
- Securities Industry Essentials **March 2024**

Professional Experience

Principal, Remote
Customer Experience Specialist II **August 2023-Present**
Correspond with customers via inbound and outbound calls to provide quality customer service. Handle complex product calls or emails and resolve situations real-time based upon my foundational financial knowledge. Educate and assist 401k participants regarding their plan benefits and help them take action toward preparing for retirement.

Well, Chapel Hill, NC **2022-2023**
Well Guide Member Services
Interface with Well members, based on their preferences (chat or phone) to create a dialogue around health and wellness that is personalized to the individual member's goals. Proactively connect with members to follow-up on previous health related questions or in response to new health information received about a Well member. Ensured sensitive member data was secure and safe, according to security policies and HIPAA guidelines.

Fidelity Investments, Durham, NC **2021- 2022**
Customer Relationship Advocate
Answered inbound calls regarding account balances, withdrawals, fund transfers and other financial services. Educated customers on options to improve their financial security. Guided customers to the appropriate online financial resources related to their needs.

Wells Fargo Bank, Raleigh and Winterville, NC **2012 – 2021**
Client Service Consultant 1, 2019 –2021

Built trust-based relationships aimed at increasing customer loyalty. Leveraged product knowledge to articulate lending information to a broad range of clients. Interfaced with vehicle dealerships regarding loan paperwork and payment funding.

- Led weekly team huddles for 15 to 20 agents.
- Conducted financial audits to ensure data integrity and information accuracy.

Account Resolution Specialist 3, 2017 – 2019
Created exceptional customer experiences by utilizing a respectful, solution-focused approach to collecting payments on outstanding balances. Proposed pragmatic solutions and negotiated repayment terms while adhering to state and federal regulations governing collection practices.

- Consistently ranked as top performer out of approximately 300 agents.
- Trained nearly 20 newly hired agents monthly.

Quality Monitor 1, 2016 – 2017
Monitored inbound and outbound customer calls; evaluated quality and accuracy of interactions, and agent compliance with collection procedures and regulatory requirements.

Customer Service Representative 3, Bankruptcy, 2014 – 2016
Tactfully engaged customers to understand the level of financial hardship, analyzed account statuses, and advised available solutions. Interfaced with debtors' council, dealerships, insurance carriers, and internal financial analysts to collect additional case information and review proof of claims, redemption offers, reaffirmation agreements, and plan valuation.

- Trained, coached, and mentored new agents.

Customer Service Representative 2, 2012 – 2014
Navigated multiple phone, computer, and online systems and screens to accurately answer questions, resolve issues, process transactions, and email appropriate departments to complete operational processes.

- Recognized as top performer out of up to 100 agents.

Additional Experience

AAA, Roanoke Rapids, NC
Call Center Supervisor

Managed departmental budget, staffing requirements, and employee development. Hired, trained, and coached call center agents, monitored and measured performance, conducted evaluations, and generated reports on team results. Established schedules, organized workflows, and delegated assignments.

Education

Bachelor of Science, Health and Physical Education Coursework
Fayetteville State University, Fayetteville, NC