

Zachary Cole Warner

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PROFESSIONAL EXPERIENCE

LOAN OFFICER, HomeStreet Bank, San Francisco, CA

1/2017 – present

- Consult with clients on their financing options and recommend appropriate home loan products and lines of credit.
- Exercise discretion and independent judgment in comparing and evaluating possible financial products for clients.
- Understand and comply with all applicable government regulations and cooperate with internal quality control and compliance programs.
- Complete loan applications in accordance with bank's loan file workflow through use of software applications.
- Manage the loan application process and assist clients in completing applications, collecting confidential information for verification, and providing disclosures and forms.
- Input and update application data ensuring accuracy and upload necessary client documentation.
- Actively develop and maintain a good working relationship with and between all company staff, clients, and others involved in loan transactions.
- Provide the highest level of service in all interactions with clients.

EXECUTIVE ASSISTANT TO CEO, Virtual Workflow, Inc. DBA ROI Genius, Sausalito, CA

2/2014 – 1/2017

Executive Assistance:

- Served as the primary point of contact for the CEO and assisted the CEO in various assignments and projects.
- Managed the executive calendar, scheduled and coordinated meetings and events, and followed up with clients including business development and relationship management.
- Was a key player in strategy sessions with the CEO, providing a knowledge base about client requirements and worked with CEO to create actionable software development and bring in additional upsell revenue.
- Managed budgets, organized expense reports, and processed invoices in collaboration with vendors.
- Prepared, proofread, and finalized meeting minutes, reports, supporting documents, and presentations.
- Prepared client invoices to be reviewed and approved by the CEO and passed to the bookkeeper.
- Served as a liaison between the primary clients, national design firms, and offshore technology resources.

Project Management:

- Responsible for special project management and delivery of complex web applications and interactive websites.
- Led a team of developers, QA, and UX designers and functioned as a resolution manager cross-functionally.
- Notable client projects:
 - StartOut, a 501C3 non-profit organization, startout.org
 - Worked daily with the Executive Director.
 - Customized the ROI Genius Enterprise software platform for non-profit use.
 - Managed multiple project teams to organize collateral for website production.
 - Created an online community portal with communication tools enabling members to connect and collectively share knowledge and success.
 - Implemented a CMS to provide editorial freedom to update imagery, videos, text and local chapter events.
 - Customized eCommerce applications for event ticketing, memberships, and donations.
 - Real Estate Investment Trust NYSE: STAR, iStar.com
 - Worked daily with VP of Strategic Marketing and Planning.
 - Managed and completed the development of a customized data management system for large master planned communities nationwide.
 - Integrated multi-community lead generation, permission marketing, surveys, and analytics.
 - Worked on an ongoing basis with portfolio managers to produce audited community ROI reports.
 - Managed and completed the development of a master community builder program.
 - Implemented a vendor invoice submission and approval program process, integrated with a budgeting program to determine ROI for all marketing activities.

SALES REPRESENTATIVE, Vita-Mix Corporation, San Francisco, CA

3/2008 – 12/2013

- Generated approximately \$900,000 in revenue annually and maintained in top 2.5% of commission earners.
- Sustained strong revenue gains and exceeded annual quotas despite a fiercely competitive market, selling a product priced 500% higher than competition.
- Excellent at learning and listening to the clients' needs and altering value proposition to fit the clients needs.
- Effectively trained new and underperforming sales reps, provided continuing education, on-site coaching, and motivated team members to adapt to company policy changes while accomplishing local team goals.
- Successfully managed 24 annual shows: staff scheduling, training, inventory, and expenses.
- Recipient of the Top Sales Team and Most Improved Sales Rep (2010), Ironman (2011) and Top Sales Team and Top Income Earner (2012) Awards.

COMMUNITY LIAISON – MARKETING & SALES, Hearts for Hospice, Salt Lake City, UT

12/2006 – 3/2008

- Responsible for outreach functions aiming to facilitate patient access to hospice program services.
- Tripled overall patient population by building relationships with community organizations and referrers, including physicians, case managers, and other health care professionals.
- Conducted personal outreach visits to existing and potential referral sources, prospective patients, and other interested parties to educate about medical homecare services and increase Company pipeline.
- Implemented area specific outreach plans and coordinated with patient care staff, clinical, and management team members ensuring outstanding and responsive patient care services.
- Initiated and implemented co-marketing events with affiliate companies.
- Recipient of the Marketer of the Year and Patient Census Champion Awards.

EDUCATION

WEBER STATE UNIVERSITY

Bachelor of Science Degree, Zoology

2006

Student Body Vice President of Events, WSU Office of Student Involvement & Leadership

2005 - 2006

- Planned, organized, and executed major campus events i.e. Welcome Week, Homecoming and Commencement and provided students with various opportunities to enhance their college experience through community involvement.
- Served as the primary support and resource for the 180 registered clubs and organizations that encompassed a variety of interests, academic areas, cultures, religions, club sports and service organizations.
- Developed students to become better leaders by providing curricular and co-curricular leadership opportunities.
- Liaised between the students and Executive Branch and provided a stronger, united voice for student concerns to the administration and faculty through representation through the Student Senate.

ADDITIONAL SKILLS

- Atlassian (JIRA), WordPress, iContact, Google Apps, Google Analytics, Microsoft Office, Salesforce and other cloud-based lead generation and CRM programs.
- Fluently bilingual in English and Spanish.

VOLUNTARY SERVICE

AIDS LIFECYCLE, Cyclist and Fundraiser

2015 - present

- Annual 7-day, 545-mile bike ride from San Francisco to Los Angeles to raise money and awareness in the fight against HIV/AIDS.
- Peer-to-Peer fundraising – raised over \$8,500.

INTERESTS

- Performing arts, life sciences, technology, and sustainability.
- Skiing and long distance cycling.