Elvir Tabakovic

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Professional Summary

Vision-driven change agent with career-long record of mortgage banking, sales management, and leadership success for top organizations

A dynamic, motivated professional with the background and proven work ethic to guide and support personal finances, sales management, regulatory compliance, and more. Dedicated leader who is known for delivering excellent service in fast-paced environments, with the skill set to analyze complex information, generate viable leads, implement effective sales strategies, and lead diverse individuals. Out-of-the-box thinker who is comfortable working in teams or independently to ensure solutions consistently meet or exceed business goals.

Core Competencies

- Loan Processing
- Sales Methodologies
- Lead Generation
- Cold Calling
- Client Qualification
- Business Development
- Data Analysis
- Financial Review
- Outbound Sales
- Strategic Planning
- Problem Solving
- Critical Thinking

Professional Experience

Passalacqua & Associates, LLC, Utica, NY, March 2024 to Present
SENIOR SALES LEAD

- Drive revenue growth, expanding the firm's client base, and fostering long-term client relationships through strategic sales initiatives and exceptional service delivery.
- Negotiate terms of engagement with clients, including pricing, scope of work, and contractual agreements, with the aim of securing new business for the firm.
- Work closely with attorneys and legal staff to understand the firm's capabilities and effectively communicate those to clients during the sales process.
- Maintain a basic understanding of legal principles and stay informed about changes in relevant laws and regulations that may impact clients or the firm's services.
- Assist in the development of sales budgets and forecasts, and actively manage sales activities to meet or exceed established targets and goals.
- Ensure compliance with ethical guidelines and regulations governing legal sales and marketing activities, maintaining the integrity and reputation of the firm at all times.

BPAS, Inc., Utica, NY, November 2023 to March 2024
CONVERSION SPECIALIST

- Import participant and financial information from files from prior administrators and client files, set up balance forward funds.
- Coordinate the transition between distributors, dealers/brokers, prior administrators, prior asset holders, clients and their accountants and lawyers, plan HR, etc.
- Facilitate the release of Blackout Notices, Letters of Notification, and Instructions per previous admin/asset holders and timelines and fund verification approval notices.
- Reconciliation of the valuation from prior administrators to BPAS records.
- Process transactions for trading from receiving wire transfers, or transfers in kind, at plan level and participant level accounts. Perform the collection of backup materials and set up of all takeover loans.

INFI, CHICAGO, IL (REMOTE), MARCH 2023 TO NOVEMBER 2023
SALES CONSULTANT

- Expand and develop new client bases in target areas.
- Manage and follow up with potential clients via phone call, email, or other possible communications to generate new business revenue.
- Generate new business revenue by selling company products (Kiosks, Mobile Applications, Website development services, etc) via online demos, phone calls, email, text, and other possible communications available.
- Build strong relationships with clients for long-term partnerships.

ROCKET MORTGAGE, DETROIT, MI (REMOTE), SEPTEMBER 2021 TO NOVEMBER 2022
MORTGAGE BANKER

- Demonstrate expertise in conducting all activities related to completing and processing loan applications for diverse clients.
- Provide consultations to applicants on mortgage solutions that best fit their needs and financial situation. Advisements such as showing applicants how they can utilize their equity towards outstanding debts is one aspect.
- Conduct in-depth credit evaluations and review loan applications to pre-qualify and pre-approve loans. Analysis of credit reports can help mitigate risks for the applicant but also the lender. Calculating debt-to-income ratios is one key aspect of this.
- Utilize proprietary loan software to process and prepare loan applications.
- Communicate regularly with clients throughout the closing cycle and assist in any processes from loan origination through to closing.
- Completed and passed the state and federal mortgage license exam as required.
- Work closely with the underwriting department to determine conditions for loan approval.
- Identify potential risks that could lead to a default on the mortgage loan.
- Executed 150-200 outbound dials daily (cold), received inbound calls (warm), prospected potential leads, and reached out via email and text.

SYRACUSE PAVILION (FIRETREE LTD.), SYRACUSE, NY, SEPTEMBER 2020 TO SEPTEMBER 2021
FEDERAL CASE MANAGER

- Spearheaded the intake and orientation of clients as well as counseling and home plan development in conjunction with the Federal Bureau of Prisons Statement of Work.
- Executed complex correctional casework in a residential re-entry center setting with accountability for defining and evaluating program needs and other data regarding inmates.
- Tracked and assessed the progress of individual offenders in the residential re-entry center and facilitated effective inmate training programs.
- Documented social histories, evaluated positive and negative aspects in each case, and developed release plans.
- Created Individualized Program Plans for BOP inmates and USPO clients which addressed resident needs and risks identified in the information provided by the BOP and the RRC.
- Contributed to monthly PRT (Progress Review Team) meetings to determine resident program needs and discuss current participation in the program to further encourage pro-social behaviors.
- Monitored BOP Home Detention placements and ensured placements were not violating home detention conditions.
- Reviewed case notes regarding GPS points on clients from the case management team. These notes contained previous case managers' notes regarding inmates' whereabouts at certain times along with approval/denial to certain destinations.
- Conducted thorough cellphone, locker, person, belonging, facility, and vehicle searches to ensure residents were abiding by the rules/regulations of the facility.

MUNSON WILLIAMS PROCTOR ARTS INSTITUTE, UTICA, NY, DECEMBER 2019 TO SEPTEMBER 2020
CAMPUS SAFETY OFFICER

- Carried out campus patrol and dispatch responsibilities, including inside and outside rounds of campus and buildings.
- Completed dispatch tasks while serving the needs of students and staff upon call.
- Investigated incidents and accidents on campus, contacted proper authorities when necessary, and generated detailed reports.

SECURITAS, UTICA, NY, MAY 2018 TO DECEMBER 2019
SECURITY GUARD

- Engaged with law enforcement agencies during emergencies and documented shift activity, including incidents, alarms, and disturbances.
- Enforced campus parking policies and addressed traffic violations, such as speeding, failure to obey stop signs, and failure to yield.
- Provided a general security presence as a means to deter crime and policy violations while protecting clients and property from injury, damage, or theft.

SEARS, NEW HARTFORD, NY, MARCH 2012 TO MAY 2015
SALES ASSOCIATE

- Received commendations for generating a 300% increase in rapid credit sales by delivering superior customer service and experience.

EDUCATION AND CREDENTIALS

BACHELOR OF SCIENCE (B.SC.) IN CRIMINAL JUSTICE, 2018
State University of New York at Oneonta, Oneonta, NY

ASSOCIATE TRANSFER PROGRAM, 2015
Mohawk Valley Community College, Utica, NY

ADDITIONAL INFORMATION

Languages: Bilingual in English and Bosnian

Technical Proficiencies: Windows, Linux, Mac OS, servers, routers, LAN, wireless LAN, Microsoft Exchange, Active Directory, Microsoft Office Suite, Microsoft Project, Access, SAP, Salesforce, Hubspot, OMNI