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Summary

I am a self-motivated and a very driven person, who loves a challenge. I pride myself on building great relationships with my clients and can work well both on my own or in a team.

I have over 29 years in the banking and finance industry, with skills that can be beneficial in a range of industries and jobs.

My range of transferable skills include lending analysis, mortgage qualification, managing a team, coaching, call centre experience at every level, relationship management, networking, sales, growing a business, as well as IT and social media skills.

The thing that makes me stand out are my soft skills, the way I build rapport, gain trust, build lasting relationships and increase client satisfaction. This results in profits, as well as clients who keep coming back.

Education

1983-1988

West Bank High School Skelmersdale

9 GCSE's including Maths and English

Professional Qualifications

CEMAP 1, 2 & 3

Work History

1990 - 2002

Girobank (Now Santander)

Job roles from Call Centre worker to Call Centre Manager.

Final Role as Call Centre Manager looking after 50 staff members of a business call centre advisors, taking incoming client enquiries and making outgoing calls to clients offering business banking products and services to build client relationships.

Greatest achievement was setting up a new business call centre to help service existing clients increasing revenues by 14% in 2 years and client satisfaction increased to 76%. (Now called net promoter score)

2002 - 2015

Barclays Bank Plc

Job roles from customer advisor, assistant branch manager, and finally as a premier relationship manager looking after high net worth clients.

In my final role as Premier Relationship Manager I looked after 350 high net worth clients to grow our lending and savings book, while helping client achieve their personal financial goals, and providing exceptional service.

Greatest achievements were to be number 1 in the country on balanced score card 3 years running.

Highest Net Promoter score of 86%.

Over £30m in mortgages in my last 3 years.

Jan 2016 - March 2019

Danestone Mortgage

I worked as a self-employed mortgage and protection broker offering lending solutions for the whole of market for residential, buy to let, commercial lending, as well as a range of secured and unsecured lending facilities. I also offered protection solutions from a select panel to cover life, critical illness, income protection and general household insurance. This was under my friend and colleague Allan Stables company banner.

March 2019 - Present

Knowsley Mortgage & Financial Services

In 2019 I finally took the plunge to set up my own company to offer mortgages and protection with the support of my new network The Stonebridge Group.
An exiting new chapter in my career.

Hobbies

I am an avid LFC supporter. My other interests include snowboarding, and travel. My wife and I especially enjoy city breaks and cruises.

References

Available on request.