

CAREER SUMMARY:

Financial Services Industry professional with experience in business development, customer service, market research, problem resolution, and relationship management. Consistent record of developing and maintaining positive working relationships both internally and externally. Adaptable, articulate, creative, strategic thinker with a documented record of high performance and goal achievement.

CAREER HISTORY:

Caliber Home Loans, Marlborough, MA

Closer – Boston Wholesale Operations

2017 to 2022

- Responsible for managing a large pipeline of loans for closing.
- Communicating with business partners, sales account executives, loan originators, processors, underwriters, attorneys, title agents and escrow officers to build and maintain relationships and work effectively.
- Effectively implement time management skills in a very time sensitive environment, demonstrating an ability to work proficiently and accurately under strict time constraints.
- Utilize H2O computer software to review and perform loan duties.
- Mitigating the risk of unsellable loans by carefully reviewing the underwriter's work and correcting any mistakes.
- Demonstrate keen attention to detail by reviewing and approving highly detailed settlement statements.
- Prepare final closing documents and calculate and wire correct funds to closing table.

Embrace Home Loans, Middletown, RI

Closing Officer

2015 to 2017

Embrace Home Loans, Middletown, RI

Assistant Correspondent Processor

2015

- Responsible for performing a wide range of duties in processing home mortgage loans upon receipt of the file and managing the file up to the close date.
- Provided a high level of customer service and had to maintain contact with external and internal customers, including clients and loan officers to ensure the workflow deadlines were met.

Fidelity Investments, Smithfield, RI

Senior Service Specialist - Broker Dealer Network

2007 to 2014

- Responsible for providing “*best in class*” customer service for institutional, corporate, and individual shareholder accounts for this international mutual fund and financial services company.
- Primary focus was providing a full spectrum of services to a domestic and international broker dealer network offering Fidelity Advisor Funds.
- Partnered with other Fidelity Advisor Groups to support client inquiries and services in specialized product areas.
- Actively participated in team environment meetings to provide accurate client sentiment and feedback to drive policy and process improvement opportunities.
- Selected to participate in Fidelity’s KNOW Program, a cross departmental training program to enhance high performing employee’s company and product knowledge. Subsequently responsible for sharing cross departmental training experience with team members.

Kevin L. Moitoso
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EDUCATION:

- **Masters of Business Administration** – Northeastern University Graduate School of Business Administration, Boston, MA – 2006

Concentration: Marketing

- **Bachelor of Science** – Roger Williams University, Bristol, RI – 2001
Major: Business Management / **Minor:** Political Science

COMMUNITY ACTIVITIES:

- **Eagle Scout Award Recipient and Assistant Scoutmaster** – Boy Scouts of America, Troop 7
- **Northeastern University** – Chapter Leader of the Rhode Island Alumni Association
- **Roger Williams University** – Outreach/Recruitment Chairperson and Executive Board Member for the Rhode Island Chapter Alumni Association
- **LaSalle Academy** – Board Member of the Alumni Association

LANGUAGES:

- **Portuguese**