

JAMES LOUD

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PROFILE

With over 20 years of experience in sales, account management, and business development within the mortgage sector, I bring a wealth of knowledge in financial products, relationship management, and strategic planning. My proven track record in generating new business opportunities and expanding services by building and nurturing relationships with realtors and corporate entities sets the stage for my transition into the insurance broker domain. I am keen to merge my financial expertise with insurance solutions to optimize client portfolios and contribute to the overall growth of the firm.

EXPERIENCE

Area Manager, Guaranteed Rate Affinity – 2018-2023

- Spearheaded recruitment and onboarding of top talent, driving team success through effective business planning, training, and performance management.
- Developed strategic initiatives that consistently surpassed business goals, demonstrating a keen ability to anticipate and fulfill client needs.

Managing Partner, Film Vision Studios, LLC – 2023-Present

- Pioneered a videography service that specializes in delivering high-quality, engaging content, from promotional materials to documentaries, utilizing state-of-the-art technology.
- Established and maintained excellence in service, ensuring projects exceed client expectations through meticulous attention to detail and innovation.

Wealth Management Loan Originator, Private Mortgage Banking, CPG, US Bank – 2015-2018

- Excelled in promoting mortgage products to high-net-worth clients, managing the full process to ensure seamless client experiences.
- Adapted strategies to align with market conditions, fostering strong partnerships with financial entities.

Home Mortgage Consultant, Wells Fargo – 2013–2015

- Contributed to and implemented team sales strategies, managing end-to-end mortgage transactions.

Sr. Mortgage Banker, JPMorgan Chase – 2010-2013

- Recognized for top performance, managing complex mortgage processes and delivering tailored financial solutions.
- Enhanced service delivery through cross-divisional collaboration within the bank.

Note: Previous roles include Wholesale Account Executive positions at Pacific Union Financial and JPMorgan Chase.*

EDUCATION, CERTIFICATIONS & LICENSES

Bachelor of Science in Organizational Leadership, Arizona State University, Tempe, AZ – 2016