

R O S E J. S W E E N E Y  
526 Berry Street • Stoughton WI 53589 • (608) 873-6791

PROFESSIONAL EXPERIENCE

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**CUNA Mutual Group, Madison, WI**

***Document Production Specialist***

***June, 2005 - 2009***

Processing and fulfillment of disclosure orders ranging from *Truth-In-Savings, Regulation CC (Funds Availability), Regulation E (Debit, ATM) and Privacy*. Consulting with department Compliance Analysts to assure state and federal regulations are met. Direct interaction with the credit union throughout entire process, creating time lines to ensure a quality product is delivered. Working with Loanliner documents systems, (Wynstar, MediaBin, Tracking System).

***Agreement Change Specialist***

***September, 1991 - June, 2005***

Responsible for implementing multiple product lines, including *Loan Protection/Life Savings, Mechanical Repair Coverage, Guaranteed Asset Protection Coverage and Credit Union Direct Lending (CUDL) a Guaranteed Asset Protection product*. Working knowledge of *Credit Insurance products Credit Life/ Credit Disability*.

Process new coverage, revisions, cancellations, mergers liquidations, and ordering certificates and miscellaneous forms. Developed member notices, for each of the above described product lines. Maintained Simplified System, GAP ADMIN System, Integrated Web Calculator, Tracking Tools, Total Trac System and operational knowledge of Profile and Intergroup. Research discrepancies and resolved, coverage problems communicating to field staff, credit union and members via letter e-mail, phone or fax. Provided customer service support to field and credit union staff and their members. Helped promote an understanding of Guaranteed Asset Protection and Mechanical Repair coverage's. Completed and assisted in special projects as assigned by management.

***Correspondence and Statistical Clerk – I***

***September, 1990 - September, 1991***

Data entry of Loan Protection and Life Savings Claims for credit union members. Corresponded with Credit Union, Field via e-mail and by letter. Supplied credit union with necessary forms to complete claims, Physicians Statements, and Disability forms.

***Life Policy Administration Specialist - I***

***October, 1989 - September, 1990***

Provided service to Credit Union and their members relating to Individual Life Insurance Policies. Review and process terminations, surrenders, performed routing premium audits, completed necessary contract endorsements resulting from name, beneficiary and policy coverage revisions.

***Conservation Specialist***

***May, 1987 - May, 1988***

Reviewed Individual Life Insurance Premiums daily, contacted policy holders via telephone reminding them that payment is pas due, just prior to policy lapsing in an attempt of conserving their policy.

**EDUCATION/COURSES**

***Madison East High School, Madison, WI***

***September, 1970 - June, 1975***

High School Diploma

Special Interests in, Sociology, Psychology, Art, Sports and Music.

***Madison Area Technical College, Madison, WI***

***September, 1979 - January 1981***

Part- Time

Criminal Law, Criminal Investigation and Juvenile Delinquency.

**SKILLS**

Project Work Groups, Customer Service.

**COMMUNITY CONTRIBUTIONS**

Custom Canines Service Dog Academy, Sacred Journey Lodge (Shelter for Women of Domestic Abuse) Sunday School Teacher, Saint Maria Goretti, Big Sister - Big Brothers Big Sisters of Dane County, Volunteer work for Missing Children.

***Additional Qualifications***

Thirteen years exposure and working experience in Credit Insurance closely related to credit union and member pay products Loan Protection, Life Savings, Credit Life, Credit Disability, Mechanical Repair Coverage and Guaranteed Asset Protection. Working knowledge of Individual Life products and practices. Attended company based courses in “Industry Trends and Insights”, “Wining in the Marketplace” “What’s up With Credit Union Consumer Products” and Credit Union Choice Lending Protection (CUCLP).

Thirteen years of servicing with well versed product knowledge of Loan *Protection/Life Savings*. Working knowledge of *Credit Life, Credit Disability, Mechanical Repair Coverage and Guaranteed Asset Protection Coverage in addition components of LL.COM*. Daily processing of new Loan Protection and Life Savings coverage, including revisions, cancellations, mergers liquidations, and ordering certificates and miscellaneous forms. Develop member notices, for each of the above described product lines for various situations. Research discrepancies and resolve, coverage problems communicating to field staff, credit unions and members via letter e-mail, phone or fax.

Maintaining on a daily basis the Simplified System, GAP ADMIN System, Tracking Tool, Total Trac System responsible for measuring daily work flow and production. Working knowledge of Profile and Intergroup Systems and responsible for activating the *Integrated Web Calculator* within the LL.COM Order Fulfillment Tool, for the products of *Credit Life, Credit Disability and Mechanical Repair and Guaranteed Asset Protection* coverage's. Have also been identified to receive ongoing training to activate additional components in the LL.COM Order Fulfillment.

### ***Ten Years Involvement in Numerous Department and Corporate Projects***

***Gaston Project:*** Worked from an excel spreadsheet, advising credit unions of the need to replace certain Loanliner forms containing CUNA Mutual Credit Insurance enrollment forms. Contacted credit union via telephones a courtesy call informing them a six month supply of new enrollment forms would be forwarded to them replacing previous enrollment forms. Finally offering them further assistance in their process of replacing these forms.

***Merger Process:*** One year project working with Underwriting, and entire Credit Insurance area implementing the Merger/Liquidation process. Created flow charts, wrote detailed procedures and assisted in Field Communications. After serving on the project for approximately 6 months, I was appointed as lead person to represent Issuance and Servicing in the Merger process. Designed reusable communications for Field and Underwriting, to effectively communicate to bring consistency to the merger process.

***Marketing Division Re-Alignment:*** Directly relating to the Pomona conversion, identified capabilities in the Simplified System, (Loan Protection and Life Savings) as well as Data tables related to these products. Participation was limited and basically involved research on my part. Findings were, Pomona office had limited abilities, in updating systems.

***Members Base 20 Mailing:*** Worked with Memberline Marketing Center to coordinate marketing piece to be included as an additional *conversion* product when a Life Savings cancellation would occur. This gave members an additional product in converting from Life Savings in the absence of the previous Member Elect Life Savings product.

***Loan Protection Revitalization:*** Assisted the development team which implemented a process to enhance the Loan Protection product at the same time surveyed credit unions needs, then compiled data for future sales and existing coverage.

***Loan Protection to Credit Life Conversion Process:*** Participated in the development of member notices and Credit Life Certificate to be delivered uniformly to credit unions for open enrollment period. Resulted in a smoother transaction for member and credit union.

***Field Operations - Merger Activity Report Revision:*** Assisted Field Operations in devising a marketing tool to submit Mergers, Liquidation Activity Reports.

4. Strong problem solving, organizational and troubleshooting skills experienced in present project. Working with a time sensitive process. Due to the coordination of necessary forms, and Web Calculators everything must work on a very timely manner to activate online usage for credit unions and their members, while supporting a team in a fast-paced, fast growing environment.

5. Excellent written verbal communication skills, preparing sample notices for credit union members, resulting from changes in member pay and credit union pay products. Created department shipping schedule identifying person responsible for department mail processing and print orders on a weekly rotating basis. Previous work experience with Field Communications area, notifying Field Representatives, Division Managers and Marketing Divisions of Merger process change. Create new member certificates, prepare proposals, update create and document process changes and procedures.

6. Connecting with my internal and external customers are one of my most important strengths. Understand their needs and time lines while committed to providing the highest quality service, . Currently working on the Mechanical Repair and Guaranteed Asset Protection project, focusing on team goals and objectives

7. Flexible and able to adapt to rapidly changing environment and technologies as experienced over the past three years, learning additional product lines, volunteering for opportunities to constantly promote my abilities to advance. Effective ability to multi-task on projects focusing on priorities. I am an extremely hard working, team player able to be very analytical and to work independently to perform at the highest level without a lot of direction. Completing projects on a multi-task level, with a sense of humor and above all the willingness to have fun while hard to nurture a healthy team environment.

- Strong organizational skills, detail-oriented, and the ability to handle multiple priorities
- Strong knowledge internet working principles
- Quality and customer satisfaction focused.
- Excellent documentation, and communication skills.
- Hard working and team player who can focus on team goals and objectives
- Flexible and able to adapt to rapidly changing environment and technologies. Ability to multi-task effectively on projects with competing priorities.

Ability to be very analytical and to work independently to perform at the highest level with limited direction.

Can initiate and complete projects as well as multi-task. A sense of humor. Willingness to have fun while working hard to nurture a healthy team environment.

Supporting a team in a fast-paced, fast growing, high tech environment. Development efforts building in-depth relationships with have the aptitude to continue learning how business technology applications can be used