

David L. Wakefield
12276 San Jose Blvd, Ste 747 * Jacksonville, FL 32223
Work: 904-394-1398 Cell: 904-237-1450
dwakefield@primelending.com / www.davidwakefield.com



SUMMARY OF QUALIFICATIONS & PROFESSIONAL EXPERIENCE

Extensive product knowledge coupled with creative ideas for product applications and a solid history of sales success. Proven ability to develop sales potential in new market areas. Strong analytical and planning skills, combined with the ability to coordinate the efforts of many to meet organizational goals. Productive and efficient work habits without supervision. Self-motivator with high energy. A solid background in sales since 1989 and mortgage/product experience since 1994. Additional supervisory and training experience.

EMPLOYMENT HISTORY

PrimeLending, A PlainsCapital Company - Senior Mortgage Planner 9/2008 – Present

- Working one on one with clients with a holistic approach to mortgage planning. Incorporating the mortgage as a tool in the overall financial plan.
- Responsible for sourcing business from Realtors & Closed Clients / Active Pipeline Management / Developing Builder & Developer relationships.
- Providing Training for Sales Staff, Real Estate Offices and Builders as well as client education sessions on budgeting, credit, etc... Utilizing information and resources from Dave Ramsey's Financial Peace University.
- Writing articles on various mortgage topics for the Florida Times Union.

CTX Mortgage Company - Certified Mortgage Planning Specialist 9/2004 – 9/2008

Developed a complete marketing program to attract and retain both realtors and clients.

Set up and established new territory by:

- Increasing knowledge and fiscal literacy to better advise clients & business partners.
- Developing a strategy to add value to clients and business partnerships.
- Working Life, Business and Marketing Plan to contribute at a high level to all relationships.

Pinnacle Financial Corp - Producing Branch Manager 1999 - 2004

- Responsible for internal & external sales service. Managed workflow for office.
- Coordinated the workload of processors while hiring, training & managing expenses.
- While managing, maintained relationships & was consistently top 10 for production.

Fidelity National Mortgage - Senior Loan Officer 1996-1999

- Responsible for sourcing/self-directed business with Realtors and Builders

Florida HomeLoan Corporation - Loan Officer 1994-1996

- Learned the business and became fluent in "mortgagese".

EDUCATION

BBA, Business Administration

1995 - University of North Florida, Jacksonville, FL.

Major: Marketing, with Minors in Management and Finance.

100% of total college expenses paid via earnings through full-time employment.

2000 - Todd Duncan, San Diego, CA.

Graduate of TLOPS – The loan officer productivity school. Additionally for further education frequently attended *Sales Mastery* events.

2005 - Xinnix Edge – Atlanta, GA.

Advanced Mortgage Training, designed to add efficiencies to flow of business.

2006 – CMPS Institute – Ann Arbor, MI. – Became a Certified Mortgage Planning Specialist

2007 – Present – Ongoing training, conferences and seminars to expand knowledge = *Kaizen*