

Daniel Winters

Finance Professional

Las Vegas, NV 89119

danielgwinters@gmail.com

262-210-1667

Work Experience

Mortgage Loan Originator

Landmark Credit Union - New Berlin, WI

October 2015 to October 2017

- Prospect new mortgage opportunities while developing and maintaining successful relationships with business referral sources.
- Manage personal pipeline to guarantee service standards and financial goals are met.
- Communicate and advise throughout the mortgage process to ensure client satisfaction.
- Utilize training materials, reference tools, and other resources to provide accurate up-to-date loan program / policy information to clients and partners.
- Comply with all applicable federal and state compliance guidelines relative to the position.

Accounting Director

Cardi Asphalt Paving Co - Niles, IL

August 2014 to October 2015

- Evaluate and classify risks and investments to determine potential impact on business operations.
- Develop, implement and maintain accounting and administrative policies and procedures for a wide-ranging set of activities including financial accounting and reporting, employee relations (hiring/terminating policies) and other corporate policies.
- Plan, administer and control budgets for contracts, equipment and supplies.
- Create, analyze and present financial reports in an accurate and timely manner; clearly communicate monthly and annual statements with senior management.
- Establish procedures for custody or control of assets, records, loan collateral, or securities to ensure safekeeping.

Branch Manager

Landmark Credit Union - New Berlin, WI

January 2012 to March 2014

- Effectively hire, train and manage branch staff to ensure branch pricing and costs are controlled to maintain maximum profitability.
- Direct team activities, establishing task priorities, scheduling and tracking work assignments, providing guidance, and ensuring the availability of resources.
- Approve, reject, or coordinate the approval or rejection of lines of credit, commercial, real estate, auto and personal loans.
- Plan, develop, and provide training and staff development programs, using knowledge of the effectiveness of methods such as classroom training, demonstrations, on-the-job training, meetings, conferences, and workshops.

VP-Operations

Co-Operative Credit Union - Racine, WI

June 2010 to December 2011

- Oversee all day-to-day operations. Work directly with the President and Board of Directors to determine member needs and credit union direction.
- Analyze internal processes and recommend and implement procedural or policy changes to improve operations.
- Ensure profitability while continuing to maintain credit union philosophy.

Director of Lending and Marketing

Co-Operative Credit Union - Racine, WI

May 2007 to May 2010

- Achieve lending growth while maintaining quality and profitability.
- Identify, develop, or evaluate marketing strategy, based on knowledge of establishment objectives, market characteristics, and cost and markup factors.
- Research and develop analytical tools to address issues such as portfolio construction or optimization, performance measurement, profit and loss measurement, or pricing models.

Personal Financial Officer

Co-Operative Credit Union - Racine, WI

May 2005 to May 2007

- Analyze applicants' financial status, credit, and property evaluations to determine feasibility of granting loans.
- Approve loans within specified limits and refer loan applications outside those limits to management for approval.
- Review loan agreements to ensure that they are complete and accurate according to policy.
- Analyze potential loan markets and develop referral networks to locate prospects for loans.

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Education

Bachelor of Business Administration in Finance

UNIVERSITY OF WISCONSIN - Milwaukee, WI

December 2010

CUNA MANAGEMENT SCHOOL-UNIVERSITY OF WISCONSIN - Madison, WI

July 2010

Certifications/Licenses

Certified Credit Union Executive

Credit Union Development Educator