



A GREAT HOMETOWN

BOARD/COMMITTEE MEMBERSHIP APPLICATION FORM
(Please print or type)

Date: 03/20.2023

Name: Diana Stevens **Profession:** Mortgage loan consultant

Address: 783 Lake Wellington Dr Wellington FL 33414

Subdivision: _____

Home Phone: _____ **Work Phone:** _____ **Cell:** 720-352-1669

Fax: _____ **E-Mail Address:** d.w.stevens@outlook.com

1. Is there a specific Advisory Committee you are interested in serving on?
(1) Affordable Housing advisory committee
(2) _____
2. Briefly state the reasons why you feel your appointment to this committee would be beneficial to Wellington. Please include relevant education, academic achievements and/or experience. Please feel free to attach an extra sheet or resume.
I am in the mortgage industry and have been in the financial industry for 17 years, I have a passion for helping people accomplished their dream of homeownership, I help customers with down payment assistance, I am bilingual english/spanish.
3. Are you willing and able to attend meetings on a regular basis? _____
Day Meetings: Yes x _____ No _____; Evening Meetings: Yes x _____ No _____

Active participation by members of the boards and committees is essential to their effectiveness. Village policy is such that any member of a board or committee during the course of their two year term who has two consecutive unexcused absences or four absences out of the last six meetings whether excused or unexcused is subject to being removed as a member of their respective board or committee.

4. All Wellington board and committee members must adhere to the requirements of the Palm Beach County Code of Ethics. Members must complete the required ethics training prior to the commencement of their term. Information relative to these requirements can be obtained by visiting their website at: <http://www.palmbeachcountyethics.com/>
5. To be eligible to serve, a member or prospective member shall not have been convicted of a felony by the State of Florida, the United States, or its other states and territories within ten (10) years prior to the date of their appointment or any time after their appointment. Have you been convicted of a felony within the last 10 years? _____ Yes x _____ No

RETURN THE COMPLETED FORM TO:

Jomekeyia McNeil, Deputy Village Clerk, Village of Wellington
12300 Forest Hill Blvd., Wellington, FL 33414
Telephone: 561-791-4784; Fax: 561-791-4045
e-mail: jmcneil@wellingtonfl.gov

Diana Stevens
720-352-1669
d.w.stevens@outlook.com

PERSONAL PROFILE

An energetic individual with excellent interpersonal skills seeking a challenging position in a fast paced high profile company with particular expertise in sales, supervisor, bilingual, computer experience. Passionate about providing excellent and personalize customer service. Able to contribute to corporate and financial goals and objectives.

PROFESSIONAL EXPERIENCE

**Cliffco Mortgage Bankers Now New American Funding
Mortgage Consultant****10/2022- Current**

- Recommend Loan Solutions in accordance with lending guidelines and clients' requirements
- Lead daily loan activities of a small, high-performing mortgage loan officer team
- Manage a portfolio of customer relationship
- Assist Customers with Down payment assistance
- Review documentation to ensure compliance.
- Manage own pipeline for efficiency
- Provide first time homebuyer seminars with partners
- Excellence at managing complex customer concerns and transactions.
- Consistently ensures compliance with all operational regulations, sales and service processes, policies and procedures, and completion of compliance requirements.
- Delegating essential tasks to ensure operational integrity while creating a positive customer experience.
- Knowledge of Encompass.

**East Coast Capital – Boca Raton, FL
Mortgage Consultant****03/2022-10/2022**

- Reviewed mortgage loan disclosures packages.
- Review documents and entire loan files and work to prevent problems by highlighting deficiencies.
- Take loan application for client interested in buying or refinancing their house.
- Managing pipeline consisting of conventional, FHA, VA, Non-QM, loans
- Provided first time homebuyer classes and down payment assistance.
- Facilitate timely loan closing by working directly with the title company and customer to schedule.

**PRMG Home Mortgage – West Palm Beach
Mortgage Consultant then promoted to Sales Manager****09/2019 – 03/2022**

- Recommend Loan Solutions in accordance with lending guidelines and clients' requirements.
- Lead daily loan activities of a small, high-performing mortgage loan officer team.
- Manager a portfolio of customer relationship
- Seek prospective opportunities to retain and/or develop new clients.
- Review documentation to ensure compliance.
- Provided first time homebuyer seminars and work with down payment assistance.
- Collaborate with internal and external stakeholders to complete mortgage transactions.
- Partnership with the District Manager to position the store team for success, including hiring, training, supervising, coaching and developing a highly engaged service team.

- Supervising, observing, coaching, and providing feedback to ensure consistent team performance and excellent customer satisfaction.
- Excellence at managing complex customer concerns and transactions.
- Consistently ensures compliance with all operational regulations, sales and service processes, policies and procedures, and completion of compliance requirements.
- Delegating essential tasks to ensure operational integrity while creating a positive customer experience.
- Knowledge of Encompass, sales boomerang, CRM total expert and sure fire.

American Bankshares Mortgage – West Palm Beach, FL

Business Developer/ Loan officer

12/2016 – 09/2017 left then went back from 8/2017-10/2018.

- Reviewed mortgage loan disclosures packages.
- Review documents and entire loan files and work to prevent problems by highlighting deficiencies.
- Take loan application for client interested in buying or refinancing their house.
- Managing pipeline consisting of conventional, FHA, VA, Non-QM, loans
- Tack outstanding items on all loan files and follow up with customers to ensure timely receipt of documents.
- Provided First time homebuyer classes and Down payment assistance programs .

Absolute Home Mortgage

4/2017-8/2017

- Reviewed mortgage loan disclosures packages
- Review documents and entire loan files and work to prevent problems by highlighting deficiencies
- Take loan application for client interested in buying or refinancing their house.
- Managing pipeline consisting of conventional, FHA, VA, Non-QM, loans
- Tack outstanding items on all loan files and follow up with customers to ensure timely receipt of documents
- Provided First time Homebuyer seminars and Down payment assistance programs.

Wells Fargo Bank - Denver, Colorado then transfers to West palm Beach, FL

License Personal Banker then promoted to Branch Manager

10/2009- 10/2016

- Supervises and coaches Personal Bankers to acquire and deepen customer relationships.
- Meet with all new account customers, interact with existing customers, and engage with every account close request.
- Grows the business by understanding branch performance, diagnosing any issues, building a Branch Action Plan, and inspecting with thorough follow-up.
- Responsible for hiring and retaining employees and ensuring the right mix of sales and service positions.
- Develop and coach employees and hold employees accountable for overall performance. Ensuring that all employees follow policies and procedures and operate within the guidelines of the company.
 - Primary goal is to acquire, retain and deepen customer relationships.
 - Meet with customers face to face and over the phone.
 - Provide product and services recommendations.
 - Developing Personal Bankers and Tellers.
 - Exceed expectations in all areas in annual reviews.
 - Build relationship with customers by providing them with products and services to meet their financial needs.

ACHIEVEMENTS

NMLS ID # 720802-

Harry S Truman High School Diploma- 1997