

LAURA NOBLIN, CFLP, BPB  
[laura.noblin@gmail.com](mailto:laura.noblin@gmail.com)

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SUMMARY

Over 18 years of experience in office administration and supporting high level executives, the first 4 with a heavy marketing emphasis, and the last 14 in commercial finance with a focus in operations management and expertise in funding and documentation processes.

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EXPERIENCE

**Equify Financial, LLC** (Fort Worth, TX)

**May 2014 – Jan. 2016**

**Documentation Specialist**

- Coordinated and facilitated ALL documentation and funding requirements for ALL transactions.
- Analyzed and interpreted credit approvals to prepare legal documentation and navigate the funding process.
- Consulted with Customers, Vendors, Lenders, Insurance Companies and District Managers to clear stipulations, resolve funding hurdles and get deals funded.
- Ordered, prepared and reviewed lien searches to clear any liens and encumbrances on equipment financed.
- Verified and cleaned up proof of ownership as reflected by the registered name at the Secretary of State of the company's state of incorporation.
- Prepared and tracked daily/weekly reports for funded and approved transactions ready to fund.
- Followed up and cleared any outstanding items needed for legal file after funding.
- Discussed deals with credit and collections as needed.

**Diversified Pure Chem** (Rhome, TX)

**May 2013 – May 2014**

**Executive Assistant**

- Coordinated and facilitated ALL documentation and funding requirements for ALL transactions.
- MAIN contact on all transactions for Lessees, Vendors, Brokers and Sales once transactions were approved.
- Worked closely with Lessees, Vendors, Brokers and Sales to clear stipulations and get deals funded.
- Handled average monthly pipeline of approximately 20-25 transactions in various stages.

Managed insurance and titling to ensure insurance was current and titles were recorded properly and originals in house on all transactions.

**TEAM Funding Solutions** (Austin, TX)

**Aug. 2012 – Apr. 2013**

**Documentation Manager**

- Coordinated and facilitated ALL documentation and funding requirements for ALL transactions.
- MAIN contact on all transactions for Lessees, Vendors, Brokers and Sales once transactions were approved.

- Worked closely with Lessees, Vendors, Brokers and Sales to clear stipulations and get deals funded.
- Handled average monthly pipeline of approximately 20-25 transactions in various stages.
- Managed insurance and titling to ensure insurance was current and titles were recorded properly and originals in house on all transactions.
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**Blue Star Capital, Inc.** (Long Beach, CA)

**Oct. 2006 – June 2012**

***Finance and Operations Manager***

- Responsible for Entire Back Office, including Credit, Funding, Documentation, Customer Service, HR, Accounting, Payroll, IT while still hands on with all Credit, Funding and Documentation activity.
- Served as the liaison to debt sources to resolve challenging transactions, strategize new programs and/or policies to implement, establish volume goals, and learn all compliance rules and regulations to make changes as necessary to funding procedures.
- Created and implemented deal status tracking system (accountability from application to funding).
- Developed New Hire Training Manual, which consisted of funding procedures for every funding source, operations procedures, and tips when submitting transactions. Facilitated trainings to review manual contents with sales and operations.
- Oversaw day-to-day operations of the entire back office team to ensure all business critical functions were happening, including reviewing submissions by sales and credit, personally funding over 25 transactions (per month) and giving final sign off on all transactions.
- Documented and published internal funding policies to increase understanding of funding requirements.
- Responsible for training of all new back office hires as well as the credit, documentation and funding training for all new sales hires.
- Handled all Accounting functions for the company, including monthly and yearly budgets, payroll, reconciling all bank and credit card accounts, monitoring daily cash position, processing accounts payable, closing out the months and years, and meeting with accountant for yearly tax return preparation.
- Managed all back office team members to ensure all other necessary functions were happening, ie. customer service, office supplies, receptionist, IT, HR, etc.
- Solely in charge of yearly holiday party each December, including venue choice, menu selection, awards, gifts, team photo, etc.
- Negotiated contracts with various vendors for office equipment, technology services and human resource management including SalesForce, Simple Signal and ADP Total Source.

**CapitalWerks, LLC** (Irvine, CA)

**Oct. 2000 – Sept. 2006**

***Senior Lease Administrator***

- MAIN contact on all transactions for Lessees and Vendors.
- Coordinated and facilitated ALL documentation and funding requirements for ALL transactions.
- Worked closely with credit department to clear stipulations and get deals funded.
- Worked closely with Lessees, Vendors and Sales to ensure transactions were funded timely.
- Handled average monthly pipeline of approximately 20-25 small ticket deals.
- Assisted other team members with challenges and problem solving on various transactions.

**Royal BodyCare** (Irving, TX)

**Jan. 1997 – Sept. 2000**

***Marketing Communications Administrator***

- Initiated new project procedures and managed company-wide project list.
- Created job profiles & production schedules and distributed to staff.
- Tracked staff assignments to assess day-to-day availability of creative staff.
- Designed and approved advertising and promotional materials.
- Final approval for ALL marketing materials to be distributed to the field.

- Traveled throughout Canada and the US to represent company to distributors and vendors at National Conventions.
  - Handled all administrative functions for the regional skin care clinics.
  - Maintained a national conference call program of 18 calls per week for more than 100,000 distributors.
  - Assist webmaster with maintenance of the corporate website.
  - Created, distributed, compiled and summarized surveys to identify needs and wants of distributors.
  - Conducted weekly customer service training to a staff of up to 15 participants.
  - Organized weekly contests for customer service staff to keep them excited and motivated.
  - Developed various templates and checklists to ensure the best possible organization of several departments.
  - Trained coworkers in multiple computer software applications.
  - Restructured report generation systems.
  - Designed, implemented, and maintained an email notification database of over 2,000 distributors.
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- Organized and promoted annual charity golf tournament.

#### EDUCATION/CERTIFICATIONS

<b>Bachelor of Business Administration – Marketing</b> , University of North Texas (Denton, TX)	<b>1996</b>
<b>Best Practices Broker (BPB)</b> , National Association of Equipment Lease Brokers	<b>2008</b>
<b>Certified Lease Professional (CLP)</b> , CLP Foundation	<b>2007</b>
<b>Seminar of the Century</b> , Peak Potentials International, Inc.	<b>2007</b>
<b>Step Into Your Greatness</b> , Peak Potentials International, Inc.	<b>2007</b>
<b>Wizard Training Camp</b> , Peak Potentials International, Inc.	<b>2007</b>
<b>Life Mastery</b> , Anthony Robbins Research International, Inc.	<b>2006</b>
<b>Ultimate Leadership Camp</b> , Peak Potentials International, Inc.	<b>2006</b>
<b>Wealth and Wisdom</b> , Peak Potentials International, Inc.	<b>2006</b>
<b>Date With Destiny</b> , Anthony Robbins Research International, Inc.	<b>2005</b>
<b>Enlightened Warrior Training</b> , Peak Potentials International, Inc.	<b>2005</b>
<b>Life Directions</b> , Peak Potentials International, Inc.	<b>2005</b>
<b>Unleash The Power Within</b> , Anthony Robbins Research International, Inc.	<b>2005</b>
<b>Wealth Mastery</b> , Anthony Robbins Research International, Inc.	<b>2005</b>
<b>The Millionaire Mind</b> , Peak Potentials International, Inc.	<b>2004</b>
<b>Boot Camp Sales Mastery</b> , Tom Hopkins International	<b>2002</b>
<b>The Landmark Self Expression &amp; Leadership Program</b> , Landmark Education	<b>2001</b>
<b>The Landmark Advanced Course</b> , Landmark Education	<b>2001</b>
<b>The Landmark Forum</b> , Landmark Education	<b>2000</b>

