

Royce Lopez

Banker

Experienced banker with excellent mathematical and analytical skills as well as a devotion to customer service. Maintained 90% satisfaction rate from banking customers for 15 months straight. Proposed changes to account opening procedures led to a 15% drop in wait time and processing errors. Looking to leverage banking skills at Merrill National.

Personal Info

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916-566-6124

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Skills

Ability to work under pressure	● ● ● ● ●
Financial planning	● ● ● ● ○
Risk assessment	● ● ● ● ●
Customer service	● ● ● ● ○
Problem solving	● ● ● ● ○
Investment management	● ● ● ● ●
Technical skills	● ● ● ● ○
Negotiation	● ● ● ● ○
Interpersonal skills	● ● ● ● ●

Experience

2016-12 -	Banker <i>RJ Savings and Trust</i>
2019-12	<ul style="list-style-type: none">Effectively managed corporate client portfolios and offered financial advice regarding investments and savings.Performed financial risk assessments and studied banking and financial market trends to prepare activity and progress reports to management.Trained and supported 12+ new bank tellers.Sold and redeemed U.S. Savings Bonds applications to the Federal Reserve as necessary.
	Key achievement <ul style="list-style-type: none">Designated primary middle market banking representative after 6 months on the job. Middle market banking revenue up 10% quarterly since then.
2015-09 -	Associate Banker
2016-12	<i>Merriweather Bank</i> <ul style="list-style-type: none">Reviewed and processed credit and loan applications according to best practices and law.Supported identifying potential sales opportunities to new business clients.Handling daily reconciliation of payments as well as maintaining incoming and outgoing cash records.
	Key Achievement <ul style="list-style-type: none">Earned "Banker of the Quarter" twice for excellence and professionalism in banking.

Education

2011 -	B.A. in Economics
2014	University of North Dakota <ul style="list-style-type: none">President of the student business and finance club for 1 year

Certificates

- Certified Financial Planner (CFP)
- Certified Financial Analyst (CFA)
- Chartered Mutual Fund Counsellor (CMFC)