

JESSICA CLAIRE

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☎ (555) 432-1000

📍 Montgomery Street, San
Francisco, CA 94105

EDUCATION

Michigan State University
East Lansing, MI • 2010

BBA: Finance
Graduated with Honors from the
Eli Broad College of Business

Oakland Community College
Waterford, MI • 2008
Business Administration Student -
2007 and 2008 Academic All-
American

KEY SKILLS

- Strong business credit analysis skills evidenced by high performance in loan volume and approval rates
- Strong knowledge of business lending structures, including using SBA 7(a) and 504 programs
- Motivated and independent worker, with strong teamwork and leadership abilities
- Have experience and success in managing my own schedule and workload
- Proficient in Microsoft Office and Customer Management systems
- Have consistently excelled in learning and understanding new concepts rapidly
- Experience with customer facing conversations on topics ranging from their banking relationships, loan requests, business processes and efficiencies, as well as personal financial goals
- Strong written, oral, and presentation skills
- Worked well with partners across various lines of business, forming strong working relationships

SUMMARY

I am a hardworking and successful Commercial Banking Relationship Manager working in the Western Michigan market for PNC Bank. I am looking to further my career by becoming a market leader for PNC as a SBA Relationship Manager, helping the Chicago market achieve exceptional results in SBA lending.

PROFESSIONAL EXPERIENCE

The Bank Of San Antonio - Commercial Banking Relationship Manager
Kerrville, TX • 04/2016 - 08/2016

- Achieving acquisition goals surrounding depository products, loan volume, treasury management solutions, and merchant services processing through managing current business banking relationships and fostering new banking relationships.
- Focus largely on the retention and acquisition of loan outstandings and new loan facilities, including SBA 7(a), Express, and 504 loans. Also focused on managing the loan closing process to ensure all due diligence items are collected in a timely manner.

Tri Counties Bank - Senior Business Banker
Mckinleyville, CA • 04/2011 - 04/2016

- Focus on the retention and acquisition of loan outstandings and new loan facilities, including evaluating the financial well-being of a company, structuring company debt, and pricing based on competition and risk to the bank.
- Cross sold many additional products after learning about a company's processes and procedures to help with the management of the banking for their company and provide additional revenue and loyalty to the bank.
- Over 100% in all 7 Business Banking goals as of 6/30/2016: Checking accounts, Merchant Services, Treasury Management, Credit Card, Lending Volume, Cash Flow Insight, and Total Revenue

Columbus Hospitality - Retail ACCEL Associate
Highlands, NC

- 12 Month rotational program learning the different aspects of the retail bank, focusing on branch management and business banking.
- Placed in the business banking track in January 2011, and supported two Business Bankers, focusing mainly on credit memos and analysis, as well as prospecting.
- As a result of grasping credit concepts and a thorough understanding of job responsibilities, I was placed as a full time business banker in May 2011, three months ahead of schedule.

Morgan Stanley Smith Barney - Prospecting Intern
City, STATE

- Worked as part of a corporate retirement plan advisory group, focused on prospecting new plans to take under management for the firm.
- Individually prospected and signed two retirement plans totaling 4.7MM in new assets under management.
- Organized a CPA networking event to help us create referral sources for retirement plans.

Wabeek Country Club - Pro Shop Attendant
City, STATE

- Focused mainly on customer service and helping members with apparel and equipment selections, as well as organizing and running events for the members.
- Junior golf coordinator and instructor in 2009 and 2010, teaching proper techniques and etiquette to 20+ junior golf members.

ACHIEVEMENTS AND EXPERIENCES

- Completed Business Lending 101, 201, Investment Real Estate Foundations, and Financial Accounting for Lenders at PNC
- Member of Grand Rapids Young Professionals
- Member of the Holland Young Professionals
- Dean's Clairet every semester at MSU
- Member of the Finance Association at MSU
- Member of the Student Investor Association at MSU
- Served as an analyst in the Student Investor Association at MSU
- Completed Wall Street Bootcamp at MSU, focusing on investment banking and deep analysis of financial statements
- NJCAA Academic All-American At OCC (2007 and 2008)
- NJCAA All-Conference, All-State, All-Regional Golfer at OCC (2007 and 2008)