JESSICA CLAIRE

resumesample@example.com

(555) 432-1000

Montgomery Street, San Francisco, CA 94105

PROFESSIONAL SUMMARY

A lower-to-mid level financial professional with a successful relationship management skills in the ultra-high net worth space, performing due diligence, maximizing revenue potential and handling time-sensitive, complex transactions.

SKILLS

- Excellent attention to detail
- Expert in customer relations
- Excellent communication skills
- Flexible team player
- Cantonese
- Financial modeling
- Financial reporting and analysis
- Complex problem solving
- Superior time management
- Proficient in Microsoft Office

EDUCATION

Baruch College
New York, USA • 2016

Postgraduate Certificate: Finance and Investments

University of British Columbia
Vancouver, Canada • 2011

Bachelor of Arts: Political Science Minor English

CERTIFICATIONS

LEVEL II CANDIDATE IN THE CFA PROGRAM

- Passed Level I of the CFA examination in 2015

CANADIAN SECURITIES INSTITUTE

- Canadian Securities Course, Conduct Practices Handbook, Personal Financial Services Advice, Financial Planning I

WORK HISTORY

Bankers Trust - Private Banking Associate
Phoenix, AZ • 2013 - 08/2015

- Built strong relationships, managed over 180 households of UHNW (3M asset requirement) of personal and holding company accounts of depository, credit and investments
- Supported Canada's top-tier Private Banker to retain and acquire business generating over 6B in revenue
- Minimized shareholder risk by preventing fraud, adhered to AML requirements, and legal disclosures
- Researched appropriate investment products for client meetings
- Completed client on-boarding, KYC updates and due diligence processes to adhere to internal legal documentation requirements
- Grew assets in portfolio through specialized products (ADI accounts, DCDs, RFAs, AgriInvest accounts, mutual funds, money markets, registered and non-registered plans)
- Maximized opportunities through an internal CRM system achieving pipeline goals
- Prevented revenue leakage through management fee increases and interest rate products
- Improved client on-boarding processes for National Office

Lifeworks Inc - Account Services Representative
Bloomington, MN • 07/2012 - 2013

- Team built by training new hires in the CSR and ASR roles improving branch efficiency and accuracy
- Decreased branch client complaints and produced effective solutions
- Exceeded sales goals for retail deposit, credit, investment and business products when suitable and referring to partners when appropriate

Benefitmall Inc. - Customer Service Representative
Fort Worth, TX • 07/2011 - 07/2012

- Developed efficient practices for front line team for new and existing clients
- Increased personal and small business client relationships for RBC transferring clients' accounts from other institutions
- Performed daily banking transactions, sold deposit, credit, investment and business products to achieve sales goals

AFFILIATIONS

Pajama Program (reading to underprivileged children in NY)
Hong Kong Association of NY (event planning, fundraising)