

JESSICA CLAIRE

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 Montgomery Street, San Francisco, CA 94105

SUMMARY

Knowledgeable in Commercial Banking Lending, Portfolio Management, and Financial Analysis in a large banking environment

KEY SKILLS AND ACHIEVEMENTS

- Proficient in CAPE
- Moody's Risk Analyst
- Microsoft Excel
- Credit Plus
- AFS/Hogan
- Microsoft Word
- Microsoft PowerPoint
- Promoted to Officer in 2013
- Risk Management Association Young Professionals Chair

EDUCATION

Devry University
Columbus, Ohio • 2009

MBA: Management

Marshall University
Huntington, West Virginia • 2005

Bachelor of Arts: Finance

EXPERIENCE

Wells Fargo - Commercial Banking Portfolio Manager

Bristol, VA • 2011 - Current

- Actively manage a commercial loan portfolio of \$100 million in loan commitments with average 12 month loan balances of \$48 million.
- Prepare underwriting documents in CAPE for annual reviews, new deal requests and PCMR's and maintain compliance with credit policy and CRA objectives.
- Perform quarterly trend analysis to affirm PDR's and maintain timely downgrades and upgrades when acceptable.
- Work directly with clients on loan servicing, new products, new loan requests.
- Active in the BDR process with the Relationship Manager to maintain client satisfaction and discover new product opportunities.

Umpqua Bank Corp - Portfolio Monitoring Analyst II

Pullman, WA • 06/2009 - 2011

- Analyzed company prepared and audited financial statements to create accurate and consistent financial spreads using Moody's Risk Analyst.
- Worked closely with Portfolio Managers to maintain bank standards and adhere to credit policy within the financial reports for accurate risk management and financial analysis.
- Performed quarterly covenant tests and reported results to Portfolio Managers and input results into Credit Plus.

Status Solutions, Llc - Universal Banker

Westerville, OH • 04/2008 - 06/2009

- Assisted branch customers with their personal banking needs to include deposit accounts, loan applications, and account maintenance.
- Recommended products to customers to drive branch revenue growth and develop deeper customer relationships.

American Business Ventures - Bookkeeper

City, STATE • 05/2006 - 03/2008

- Basic accounting and bookkeeping using Microsoft Excel
- Assisted in the management of Accounts Receivable and Inventory