

PAYTON WEBSTER

Personal Banker

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SUMMARY

Banking professional with data-driven mindset and client management skills. Experienced in asset management, credit analysis, and investment portfolio management.

EXPERIENCE

2016 - Ongoing	• Personal Banker Assistant Renaud Renaud is an asset management and broker service provider. <ul style="list-style-type: none">Constantly awarded for having 100% Customer Service SurveysImplemented improved customer service processes, reducing refunds and customer dissatisfaction by 50%.Opened accounts with a cross sale ratio of 4 products opened.
2009 - 2012	• Account Executive Thompson Ltd Thompson Ltd is a multinational financial services company. <ul style="list-style-type: none">Q1 2010 - Awarded Top Performer.Have achieved the targets 75% of times every year.Closed \$200k worth of consumer loans.
2008 - 2009	• Finance Advisor Boyle Ltd Boyle Ltd is a financial services provider in corporate banking, retail banking, investment banking, treasury, private banking, and asset management. <ul style="list-style-type: none">Managed pipeline in excess of \$300k (Salesforce CRM)Certified with IBF CACS Papers 1 & 2, CMFAS 1B, 5, 6A, 8A, 9, 9A, HIMaintained monthly customer service score at 100%
2006 - 2008	• Credit Analyst Schmeler Schmeler is an international bank providing a full suite of banking services. <ul style="list-style-type: none">Managed and grew 350 Remote Portfolio (inactive) client accounts as part of a new initiative.Appreciated by Audit Team for preventing fraud.Surpassed monthly quota of educating and on-boarding clients to Digital Engagement platform by 110%.

SKILLS

Data Analysis	FRS	Customer Interaction	Loan Applications	Personal Financial Management
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EDUCATION

2006 - 2010	• Financial Analysis, Risk and Portfolio Management Northwestern University
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