

# Jessica Claire

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## Professional Summary

Familiar with diverse banking and investment products, including deposit accounts and loans. Competent in setting up services, transferring funds and helping with complex transactions. Positive and upbeat with strong communication and problem-solving abilities. Experienced banking professional with superior attention to detail and highly ethical nature. Dedicated to maintaining optimal security and customer satisfaction while meeting ambitious sales targets. Well-versed in industry regulations and asset protection strategies. Veteran banking professional dedicated to team and business success. Knowledgeable about training employees, optimizing procedures and de-escalating challenging situations with a calm and professional approach. Analytical and detail-oriented with a demonstrated record of accomplishment in meeting sales and service goals. Successful at excelling in fast-paced, competitive banking environments. Good sales and customer service abilities paired with in-depth knowledge of bank products and services. Proficient in updating accounts, processing transactions and coordinating records. Seasoned Bank Executive highly effective at turning corporate mandates into actionable policies that optimize operations and grow revenue. Resourceful, forward-thinking leader talented at keeping bank at forefront of market. Believe in cultivating management team from within. Proven success in developing and managing solutions for small business banking customers. Knowledgeable about lending, deposit and investment products. Originates, services and closes accounts as well as providing expert advice. Results-focused Private Banker offering resourcefulness, work ethic and expertise in all areas of banking. Highly polished and driven individual with advanced understanding of sales, customer relations and goal planning.

## Skills

- Consumer Banking
  - Team Leadership
  - Opening and Closing Procedures
  - Reviewing Documents
  - Taxation Understanding
- Small Business Operations
  - Legal Standards
  - Developing Customer Relationships
  - Daily Ledgers
  - Building Customized Solutions

## Work History

- 10/2000 to 12/2014

Accountant

Taylor Corp – Amsterdam, NY

  - Completed daily cash functions like account tracking, payroll and wage allocations, budgeting, donating and all types of cash and banking reconciliations.
  - Created budgets and forecasts for management group to meet regular accounting deadlines.
  - Set up and improved accounting systems and processes to meet business needs and maximize effectiveness of operations.
  - Identified and investigated variances to financial plans and forecasts.
  - Partnered with auditors on annual audits and realized compliance with governmental tax guidelines.
  - Modified comprehensive financial reporting package to reflect growing organizational complexity.
  - Proactively researched technical tax issues related to consulting projects.
  - Enhanced budget administration by reviewing Type and Type reports, leveraging knowledge to strengthen controls and improve transparency.
  - Reconciled accounts and reviewed all materials, including surplus, income, expense data, net worth and assets.
  - Prepared documents, reports and presentations for executives and board members using advanced software proficiencies.
  - Maintained up-to-date knowledge on permits, certificates and documents mandatory for government departments.
  - Tracked financial progress by creating quarterly and yearly balance sheets.
  - Helped clients navigate interactions with tax authorities and legal concerns related to financial matters.

12/1975 to 12/2000

Banker

Sandia Resort Casino – Albuquerque, NM

- Assisted customers with setting up or closing accounts, completing loan applications and signing up for new services.
- Checked amount details and fraud markers for transaction papers such as checks and money orders.
- Completed special procedures for customers such as ordering new checks, stopping payments or investigating identity theft.
- Monitored customer behaviors and upheld strict protocols to prevent theft of assets.
- Completed highly accurate, high-volume money counts via both manual and machine-driven approaches.
- Promoted products or services to each customer to consistently achieve sales targets.
- Upheld strict financial controls by keeping funds secure and accurately transferring monies.
- Worked directly with clients investing minimum of \$Amount.
- Provided direction and leadership to all employees to maximize productivity and bottom-line profitability.
- Networked with realtors and current clients to generate referrals.
- Provided advice on different bank products and financial options.
- Defined strategies for Area and made proactive adjustments to maintain results.

10/2014 to Current

Banker

Sandia Resort Casino – Albuquerque, NM

- Checked amount details and fraud markers for transaction papers such as checks and money orders.
- Assisted customers with setting up or closing accounts, completing loan applications and signing up for new services.
- Completed special procedures for customers such as ordering new checks, stopping payments or investigating identity theft.
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- Completed highly accurate, high-volume money counts via both manual and machine-driven approaches.
- Promoted products or services to each customer to consistently achieve sales targets.
- Upheld strict financial controls by keeping funds secure and accurately transferring monies.
- Worked directly with clients investing minimum of \$Amount.
- Provided advice on different bank products and financial options.
- Networked with realtors and current clients to generate referrals.
- Provided direction and leadership to all employees to maximize productivity and bottom-line profitability.

## Education

- 06/1980
- Bachelor Of Accountancy: Accounting

Boston College - Chestnut Hill, MA