

# JESSICA CLAIRE

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## PROFESSIONAL SUMMARY

Experienced Financial Services Consultant and leader offering a 17+ years of financial industry success. Ambitious team leader adept at creating strategic alliances with organizational leaders and effectively aligning with and supporting key business initiatives. Skilled in understanding and interpreting financial statements and cash flow analysis to assess and analyze the financial conditions of companies and industry trends. Knowledgeable of financial markets, macro-economics, and the global economy.

## SKILLS

- Advanced financial analysis and credit skills
- Excellent communication and relationship-building abilities
- Financial markets knowledge
- Experienced with project implementation
- Risk management
- Strategic planning
- Organizational leadership
- Strategic Business Relationships

## WORK HISTORY

### **Business Banking Relationship Manager- VP, 04/2019 - Current**

**City National Bank Of Florida – Tampa, FL**

- Responsible for managing and retaining 45 existing commercial business banking clients.
- Responsible for identifying and pursuing new business opportunities with annual revenue of \$10-\$100 million.
- Provide financial advice and solutions to clients, such as lending, cash management, and risk management services.
- Collaborate with other teams, such as credit and underwriting, to structure and execute deals.
- Review historical financial records, current operational data, and forecasting information to identify and capitalize on operation enhancement opportunities.
- Top-tier Business Banker in 2022.

### **Sr. Regional Program Manager, 02/2015 - 03/2019**

**WELLS FARGO – City, STATE**

- Engaged with bank executives, customers, and partners to create positive, trusting, and professional relationships.
- Organized and led financial seminars and classes for interested clients, providing tips and advice for lifestyle changes and healthy living.
- Formed strategic business referral partnerships with internal and external partners.
- Collaborated with Market Leaders and District Managers to assess program capabilities, team development, and community engagement.
- Generate new business leads through partner and client referrals, and other prospecting activities, increasing active accounts by 15%.

### **Senior Branch Manager III; Vice President, 05/2011 - 01/2015**

**WELLS FARGO – City, STATE**

- Resolved issues and recommended actions based on production and compliance reports.
- Engage with senior management to develop strategic initiatives and long-term goals.
- Evaluated product sales strategies and prepared alternative approaches to goal achievement.
- Mentored and led 20 FTE banking professionals and consistently increased customer satisfaction scores to above 90%.
- Oversaw high-performance team in 2012, 2013, and 2014, with \$20 million in average booked investments.
- Responsible for hiring and promoting talented professionals to strengthen our financial consultant's team.
- Resolved issues and recommended actions based on production and compliance reports
- Demonstrated proficient leadership skills to motivate employees and build competent teams

### **Small Business Team Leader, 01/2012 - 12/2014**

**WELLS FARGO – City, STATE**

- Coached sales team members, assessing strengths and weaknesses to develop improvement plans and optimize sales performance through company coaching methodology.

- Collaborated in planning portfolio growth strategy and business plans in alignment with overall market objectives.
- Responsible for developing strategic sales growth plans in partnership with district managers and bank executives.
- Responsible for developing rapport with local small businesses through community engagement programs.
- Exceeded revenue and profitability goals, leading small business banker teams through proven coaching and motivational techniques.

Increased revenue by 400%.

- Earned Coaching Excellence award.

### **Small Business Banker, 09/2006 - 05/2011**

**WELLS FARGO BANK – City, STATE**

- Reviewed deposit profitability analysis and outlined strategies to bring unprofitable accounts back to productive status.
- Responsible for growing existing relationships and converting prospects through personal calling efforts and meetings.
- Responsible for collecting and analyzing financial information on credit clients.

- Actively listen to customers' requests, confirming understanding before addressing concerns.

- Recognized as Top Small Business Banker in 2007/08.

- Achieved 390% and 220% of assigned goal in revenue and credit goals.

- Collaborated with team members to achieve target results.

### **M&A Conversion Team Lead, 10/2008 - 11/2008**

**Wells Fargo & Company – City, STATE**

- Nominated by Regional Banking President to serve as team leader with Wells Fargo's Merger and Acquisition transition team.
- Mentored newly acquired team members on operating systems and sales processes.

- Minimized resource and time losses by addressing employee or production issues directly and implementing timely solutions.

- Responsible for training 35 new employees on systems, procedures, and products while serving new clients.

- Responsible for coaching branch managers in navigating and analyzing key reports to help them with performance-based coaching strategies.

- Supported Market Executives and different lines of business Directors with special projects and additional job duties.

- Actively listen to customers, handled concerns quickly, and ensured smooth conversion.

## EDUCATION

### **Master of Science: Finance**

**University of Wyoming - Laramie, WY**

- Dean's List

- Teaching Assistant

- Thesis Topic: Effects of Large Blockholders on Firm's Excess Return.

- Co-authors: Professor Sherrill Shaffer and Professor Lee Sanning

### **Bachelor of Science: Management Information Systems**

**University of Wyoming - Laramie, WY**

- Dean's List

- Member of the National Society Of Collegiate Scholars

- Received College of Business and College of Engineering, and International Students Scholarship

- Founder and Member of Wyoming African Students Association

- Member of the Student Government of the Associated Students of the University of Wyoming and International Students Association

## GRADUATE SCHOOL- THESIS ABSTRACT

- I analyze the impact of the level of blockholders on firm performance. Specifically, I estimate the relationship between the level of firm blockholders and excess returns of the firm using the Fama-French Three-Factor Model and six different group categories of block ownership level. The results of this study indicate that there exists a non-monotonic relationship between blockholders level and firm performance. I find relatively higher performance for firms with moderate levels of blockholders and relatively lower performance for firms with low (or no) blockholders or high level of blockholders. This suggests that there may exist an optimal level of blockholders.

## LANGUAGES

### **Amharic:**

### **English:**

### **Negotiated:**

### **Negotiated:**

## AFFILIATIONS

- Board Member- DC Chamber of Commerce