

Jessica Claire

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SUMMARY

Resourceful and meticulous professional with experience successfully supporting business operations. Knowledgeable about banking industry practices, regulations, and office management protocols. Stellar interpersonal and operations oversight skills. Well-developed communicator with outstanding skills in complex problem-solving and conflict resolution. Highly organized, flexible, forward-thinking, and responsive to changing demands. Talented in multitasking, using superior time management and problem-resolution skills. Experience with working in varied team dynamics; including virtual, cross-functional, and self-managed collaborations.

SKILLS

- Articulate and well-spoken
- Customer service oriented
- Banking industry rules, policies and regulatory compliance
- Detail-oriented
- Risk management
- Research and organization skills
- Performance monitoring and evaluation
- Proposals and presentations
- Project and vendor oversight
- Proper phone etiquette
- Excellent communication skills
- Exceptional time management skills
- Strong interpersonal and problem solving skills
- Cash handling, wire transfers and loan applications
- Customer relationship building
- Record keeping and reporting
- Data Analysis

EXPERIENCE

ASSISTANT VICE-PRESIDENT OF RETAIL BANKING 05/2011 to 07/2021

Conduent Incorporated | Covington, KY

- Supervised, coached, and trained team of branch banking employees.
- Managed external contacts and kept track of periodic communication needed for priority actions. Managed daily financial tasks such as invoices, reports regional management requests.
- Verified operation of office equipment by completing preventive maintenance requirements and calling for repairs.
- Supported auditors during review process with clerical support.
- Tackled and addressed top-level, high-priority issues with professional administrative discretion.
- Oversaw and implemented branch and banking policies and procedures.
- Crafted proposals and memos using desktop publishing and word processing software.
- Engaged in customer retention practices by providing customers with personal touch resolutions, that resulted in efficient, effective and beneficial outcomes to customer complaints, while functioning within bank regulations, and guidelines.
- Reviewed and approved work orders, invoices and related branch operation activities. Functioned as liaison in vendor-client disputes, inquiries, and resolution.
- Worked with regulatory representatives to complete accurate filings and maintain compliance (CTR/ SAR/monetary instruments reporting).
- Processed bank transactions; new account opening & maintenance, deposits, transfers, withdrawals-approval limit up to 500K, wire transfers, research requests, verification of deposit requests, reviewed special customer requests and exceptions.
- Reviewed bank activity reports daily for branch items requiring corrective action (customer transactions, bank employee maintenance, and account operational and risk reports).
- Completed daily quality control review of electronic imaged customer account files for accuracy, and compliance based on bank regulations.
- Oversaw office renovations, and repairs with oversight from corporate office/regional manager.
- Managed corporate-level assigned projects by overseeing, documenting, compiling and tracking project milestones and deadlines.
- Accomplished weekly analysis of system generated reports on customers with aggregate balances between \$500K- \$1M to assess level of risk to bank based on Beal Bank & Beal Bank USA regulations. Completed quality control measures to ensure account balances are not in excess of specified limits.
- Reviewed daily report used to track potential check kiting risks to help mitigate bank loss.
- Tracked and assessed validity of daily transactions above \$2500.00 posted to bank subsidiaries. Used existing banking reports and tools, along with customer records to analyze legitimacy of item presented for payment.
- Participated in community outreach programs providing financial education to low-moderate income residents by serving as financial consultant and financial literacy educator.

ASISTANT BRANCH MANAGER/ FINANCIAL SERVICE REPRESENTATIVE, CUSTOMER SERVICE REPRESENTATIVE 07/2004 to 05/2011

Mid-Atlantic Federal Credit Union | City, STATE

- Displayed keen attention to detail in assessing short and long-term customer product needs.
- Established and maintained customer accounts.
- Cultivated impactful relationships with customers and drove business development by delivering expert product knowledge.
- Informed customers about billing procedures, processed payments and provided payment option setup assistance.
- Assessed customer needs and upsold products and services to maximize sales.
- Fielded customer complaints and queries, fast-tracking them for problem resolution.
- Met and exceeded monthly goals for establishing new accounts, consumer loans and investment referrals.
- Conducted new hire training of customer and financial service representatives on credit union procedures and policies.
- Observed and reported employee-customer interaction/sales performance on a weekly basis.
- Developed and implemented action plans based on branch sales goals.
- Diligently maintained branch operations related to auditing cash/negotiable items, implementation of policy changes, reporting of currency transactions, and cash management duties.
- Excelled in effective inter-departmental communication and cross-functional team environment.
- Maintained detailed and accurate accounting records by overseeing documentation of sales, purchases and requisitions of monetary instruments.
- Collaborated with branch manager to develop customer service improvement initiatives.
- Upheld privacy and security requirements established by US regulatory agencies.
- De-escalated problematic customer concerns, maintaining calm, friendly demeanor.

CUSTOMER SERVICE REPRESENTATIVE 05/2002 to 07/2004

Chevy Chase Bank, Capital One | City, STATE

- Processed account transactions (deposits, withdrawals, transfers) accurately and efficiently.
- Fulfilled business account requests, including check and cash orders, and deposit verification and account research.
- Completed daily settlement of ATM deposits/cash machines and replenishment of funds.
- Recommended and referred additional products and services to customers.
- Accomplished company-wide monthly knowledge-based examinations.
- Remained constantly aware of customer activity to ensure safe and secure banking environment.
- Escalated customer concerns, and special requests branch supervisors.
- Asked probing questions to determine service needs and successfully recommended appropriate banking products.

EDUCATION AND TRAINING

- MBA** 2015
University of Phoenix, Arlington, VA
- Bachelor of Science | Business Administration/ Human Resource Management** 2010
University of Maryland University College, Adelphi, MD
- Associate of Arts** 2006
Montgomery College, Takoma Park, MD