

Jessica Claire

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SUMMARY

Talented Financial Executive successful in managing highly effective teams with a focus on account service and retention. Detail-oriented financial professional with 17 years of industry experience. Persuasive communicator with proactive approach to resolving account and customer service issues. Award winning financial leader and innovator in digital banking.

SKILLS

- Excels in team leadership
- Account analysis expertise
- Expert in risk management
- Investment guidance
- Employee training
- Client relationship management
- Reliable
- Customer and vendor relations
- Excellent communication skills
- Cost and budget analysis
- Financial analysis and planning
- Safety protocol
- Energetic
- Strong interpersonal skills
- Key performance indicators
- Multilingual in: Portuguese, English, Spanish
- Strategic planning
- People-oriented
- Dependable
- Multi-tasking ability
- Regulatory compliance
- Staff supervision
- Excellent work ethic
- Risk analysis
- Excellent time management skills

EXPERIENCE

- 01/2014 to 01/2021 **Digital Branch Manager**
Nbk Bank – Kansas City, MO
- Maximized branch revenue by optimizing daily operations.
 - Boosted customer base, acquiring new customers and identifying needs to deliver relevant products.
 - Evaluated budget plans and current costs to project trends and recommend updates.
 - Monitored more than 700 client relationships per Month.
 - Monitored more than 20 client relationships per monthly.
 - Produced sales by executing complete sales cycle process from prospecting through contract negotiations and close.
 - Developed annual branch business plan for maximum profitability and effectiveness.
 - Worked with regulatory representatives to complete accurate filings and maintain compliance.
 - Analyzed applicants' financial status, credit and property evaluation to determine feasibility of granting loans.
 - Educated customers on variety of loan products and available credit options to promote valuable decision-making.
 - Complied with company policies and government regulations to prevent and detect rule violations and protect organization from fines and lawsuits.
 - Planned and coordinated risk mitigation strategies to protect company assets.
 - Built strong rapport with new and existing clients to better serve financial needs and promote branch loyalty.
 - Oversaw branch team with 4 customer service representatives and 16 personal bankers and implemented training for all new employees.
 - Designed sales and service strategies to improve revenue and retention.
 - Received Top Digital Branch in Brazil 2019.
 - Increased efficiency and drove branch revenue by optimizing daily operations.
 - Assessed employee performance and issued disciplinary notices.
 - Coordinated special update and conversion projects and monitored key performance metrics.
- 01/2010 to 01/2014 **Relationship Manager**
Advisors Excel – Topeka, KS
- Reviewed and analyzed client financial data to plan proposals.
 - Presented product and service details at various events to increase customer base.
 - Enticed clients to accept wealth management proposals to increase monthly business.
 - Provided information on technology resources to improve clients financial well-being.
 - Streamlined communication efforts by measuring client satisfaction metrics.
 - Achieved client loyalty through quality, productivity, service and proactive management.
 - Drafted monthly summaries to review level of client participation and identify targets for follow-up calls.
 - Managed [Number]+ regular [Type] customers.
 - Built long-term relationships with lucrative clients by utilizing active listening, effective communication and dynamic interpersonal skills.
 - Brought in \$[Amount] in new business in [Year] and over [Number] new clients in collaboration with branch financial advisors and support staff.
 - Addressed inquiries from clients and relationship management department team members.
 - Developed and enhanced client relationships by leveraging exceptional [Type] expertise.
 - Promoted strategies for enhancing credit management processes, including processing loan documentation and maintaining compliance with [Type] standards.
 - Maximized and maintained client satisfaction in all aspects of credit management.
 - Supervised \$[Amount] [Number]-client portfolio of high net worth individuals, building rapport and relationships through consistent quality interactions.
- 03/2008 to 01/2010 **Relationship Banker**
Pnc Financial Services Group, Inc. – Kalamazoo, MI
- Modified, opened and closed customer accounts.
 - Advised customers on bank products, services and financial planning options.
 - Improved decision-making by using current data on market conditions and individual financial situations.
 - Completed loan servicing procedures to assess compliance with bank and regulatory terms and conditions.
 - Drafted monthly summaries to review level of client participation and identify targets for follow-up calls.
 - Addressed inquiries from clients and relationship management department team members.
 - Made continuous business adjustments to improve branch operations.
 - Completed thorough and accurate documentation for all money movements, deposits or withdrawals.
 - Adhered to bank and legal guidelines for reporting, loan approvals, and money handling.
 - Developed culture of success rewarding performance, productivity and sales results.
 - Handled a portfolio of customers and reviewed accounts for signs of discrepancies, fraud or non-payment issues.
 - Cultivated positive relationships with key stakeholders and decision-makers as part of successful business practices.
 - Met or exceeded sales goals by promoting bank products and services in every interaction.
 - Maintained optimal financial controls by securing funds and making accurate transactions.
 - Helped customers open and close accounts, apply for loans and make sound financial decisions.
 - Met with new clients and completed pre-qualification procedures.
 - Assessed financial means and desires of each client in order to set up appropriate mortgage packages.
 - Put together and executed loan documents.
 - Customized products and services to meet specific banking requirements.
 - Developed and oversaw events to bring in customers and promote products.
- 05/2004 to 02/2008 **Business Manager**
The University Of Oklahoma – Norman, OK
- Mitigated financial discrepancies to maintain company's good financial standing.
 - Analyzed regional market trends to distinguish best courses of action for company.
 - Designed detailed business plans to outline finances, goals, and operations of company.
 - Cultivated relations with customers and dealership personnel to drive client retention and long-term growth initiatives.
 - Represented integrity and professionalism in all areas of business, serving as mentor and roll model to staff.
 - Strategized long-term business needs, driving customer feedback for process improvements.
 - Directed negotiation and preparation of all contracts.

EDUCATION AND TRAINING

- 06/2012 **MBA: Business Management**
Mackenzie Presbyterian University - Sao Paulo, Brazil
- Ranked in Top 10% of class
 - Completed coursework in Business Management with an emphasis in leadership.
- 06/2007 **BBA: Business Administration**
Integrated College Rio Branco - Sao Paulo, Brazil
- 02/2020 **CPA20: Finance Certification**
ANBIMA - Sao Paulo, Brazil
- 04/2020 **Development in Emotional Intelligence**
CONQUER - United States (Online)
- 01/2021 **Successful Career Development**
University Of Georgia - United States (Online)

ACCOMPLISHMENTS

- Won Top Digital Agency - Brazil award for 2019.
- Selected to participate in the Beta Launch of Itau Personalte's first digital branch. Designed to cater to the high income segment of Brazil.
- Responsible for the Evolution of 5% of the NPS (Net Promoter Score) indicator of customer satisfaction.
- Winner of the Raising Campaign - 2019
- Digital Branch awarded for Credit - 2018
- Award for Credit Recovery Campaign - 2018
- Led team to achieve several, earning recognition from upper management and financial reward.
- Recognized as Leader of the Month for outstanding performance and team contributions on numerous occasions.
- Consistently maintained high customer satisfaction ratings.