

# Jessica Claire

📍 Montgomery Street, San Francisco, CA 94105    📞 (555) 432-1000    ✉️ resumesample@example.com

## PROFESSIONAL SUMMARY

Customer-oriented Bank Officer offering nine years of experience overseeing online services and verifying adherence to state and federal banking rules and regulations. Supportive and communicative professional polished in providing banking services to individuals and corporate customers, including opening accounts and upselling financial services. In-depth knowledge of available bank products and services paired with outstanding customer service abilities. Professional Banking Officer with experience serving bank customers through various offerings. Helpful when processing transactions, opening accounts and cross-selling bank services. Team player quick to assist staff members in various departments. Managers and other staff with various needs to deliver outstanding service. Accomplished Bank Officer with nine years of experience interacting with customers to increase sales and offer services. Seasoned expert at promoting products and offerings, creating new accounts and assisting customers with various requests. Motivated and results-oriented with background increasing new customer accounts and maximizing services among existing customers.

## SKILLS

- Training & Development
- Sales
- Cash management
- Banking document preparation
- Teller support
- Build relationships with customers
- Banking product sales
- Product presentation
- Bank services
- Transactions
- Detail-oriented
- Process implementation
- Skilled with both formal and informal presentations
- Accomplished sales skills and working knowledge of business and community

## WORK HISTORY

**ONLINE BANKING OFFICER** 01/2019 to CURRENT

**L'oreal | Sacramento, CA**

- Met with clients to generate new business and negotiate contracts.
- Directed staff of 15 personnel including four direct reports.
- Established key procedures for teams preparing documentation, models and presentations.
- Encouraged employee development and promoted staff from within.
- Analyzed customer profiles to identify appropriate products and provide value-added approaches to client issues.
- Collaborated with compliance department to complete audits in several areas. Including Federal, State and internal audits.
- Complete annual due diligence for ACH and RDC clients. Included obtaining financial statements to analyze risk and establish thresholds.
- Managed and oversaw biggest online banking conversion in bank history in 2020.
- Integral piece during recent bank merger. Managed and trained staff in Cash Management and Online Services.
- Rewrote and update policies/procedures for different areas and products.
- Involved heavily with mapping of data during bank merger.
- Work closely with lending team to cross-sell and migrate customers to appropriate product set
- Demonstrate services and products to prospects through personal meetings
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**ONLINE BANKING/CASH MANAGEMENT SPECIALIST** 05/2016 to 01/2019

**Gcs Credit Union | O'fallon, IL**

- Provide support to customers and bank staff regarding electronic products and services
- Establish online customer accounts including entering data, assigning access permissions and performing account verification
- Ensure timely response and resolution of customer questions and issues in timely, professional manner via telephone, email or in-person
- Perform maintenance to existing online accounts, re-setting passwords and making account changes as requested
- Monitor electronic security system for cash management clients
- Perform daily tasks including account balancing, monitor of fraud prevention, review mobile deposited checks, review bill pay and ACH reports
- Manage multiple email accounts
- Assist customers in ACH and wire origination
- Take consultative approach with customers and match customers with non-loan products that best fit their needs to include, but are not limited to, online banking, bill pay, remote deposit capture, wire transfer, eStatements, ACH origination

**CUSTOMER SERVICE REPRESENTATIVE** 01/2016 to 05/2016

**First Western Bank & Trust | City, STATE**

- Greet visitors and customers in courteous manner
- Establish solid customer relationships through identifying needs, providing creative and best solutions for customers, and using cross-sell and referral opportunities
- Open new accounts, assist customers with changes and updates to existing accounts
- Answer customer credit and debit card questions, resolve maintenance issues, and post payments
- Open and maintained certificates of deposits for customers

**TELLER** 08/2012 to 05/2016

**First Western Bank & Trust | City, STATE**

- Performed daily teller functions including, receiving deposits & loan payments; cashing checks; issuing savings withdrawals; recording night & mail deposits; issuing cashier's checks & money orders
- Counted, packaged & verified currency and coins maintained in drawer and sold to vaults; reconciled loan coupons and other transactions
- Maintained recommended cash limits in drawer and vaults; performed teller closing procedures to ensure teller stations and bank access areas are ready for next business day
- Accurately balance cash drawer at end of each business day
- Trained newly hired tellers, providing extensive mentoring along with positive reinforcement.

## EDUCATION

**Bachelor of Science | International Business** 05/2016  
**Minot State University, Minot, ND**

**Bachelor of Science | Business Management** 05/2016  
**Minot State University, Minot, ND**

**High School Diploma** 05/2012  
**Garrison High School, Garrison, ND**

## ACCOMPLISHMENTS

- Collaborated with team of [Number] in the development of [Project name].
- Supervised team of four staff members.
- Implemented and tested positive pay system for fraud prevention
- Led online services through bank merger
- Key deciding member in online banking platform conversion
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