

# Jessica Claire

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## PROFESSIONAL SUMMARY

Organized and detail-oriented Vice President with excellent employee development, customer service and analytics skills coupled with more than 23 years of experience. Highly effective and comfortable giving engaging presentations to clients to drive new business, expand accounts and establish brand profile. Excellent team builder and leader of initiatives that result in improved revenues.

## SKILLS

- Targeted marketing
- Customer portfolio management
- Sales expertise
- Solution development
- Loans
- Business relationship cultivation
- Business Development
- Relationship building and retention

## EXPERIENCE

**Vice President, Business Banking Sales Manager**, 10/2021 - Current

**Charles Schwab Corporation** – Arlington, VA

- Leading the Business Banking Division, with serves clients throughout the bank’s footprint.
- Leading a team consisting of Market Relationship Managers who proactively offer quality financial products and services that meet the unique needs of local businesses and professional practices.
- Responsible for strategic leadership, sales management, business development, employee development, training development and delivery, channel optimization, product development, and asset quality management.
- Contributing member of the development and execution of the bank’s Change Management Program, nCino Loan Organization system and Product Development Committee.

**Vice President, SBA Relationship Manager**, 09/2019 - 10/2021

**Sandy Spring Bank** – City, STATE

- Drive new Small Business Administration (SBA) loan portfolio growth.
- Responsible for internal and external business development.
- Responsible for pre-screening applicants for SBA eligibility.
- Assist the SBA Loan Portfolio Manager with underwriting and portfolio management.
- Act as the Bank’s back-up SBA Lending Officer.
- Identified opportunities to improve business process flows and overall departmental productivity.

**Vice President, Market Relationship Manager**, 01/2014 - 09/2019

**Sandy Spring Bank** – City, STATE

- Responsible for developing new business relationships, with an emphasis on industry specialization targets.
- Expand existing relationships utilizing professional business development techniques to prospect, identify and meet client needs.
- Successfully partner with assigned branches to prospect and develop new Business Banking clients in assigned regions.
- Primary contact for assigned clients with continually expanding the client relationship through a needs-based selling technique.
- Participate and lead business events and networking opportunities.
- Effectively work with key representatives from all areas of the company to cross-sell products and services, to include treasury, insurance, merchant services, and wealth management.
- Proactively assist branch personnel with sales and credit training, sales call coaching and product knowledge. Generate new loan production with new and established business clients, to include conventional and SBA lending, while working with appropriate CRM and/or Small Business Loan Center to facilitate the approval of loan transactions.

**Vice President, Branch Manager**, 03/2010 - 04/2014

**Sandy Spring Bank** – City, STATE

- Management position accountable for soliciting business accounts and developing strategic alliances with clientele.
- managed a staff of seven employees, to include Personal Bankers, Tellers and Retail Support Staff employees.
- Developed tactics to increase assets and profitability in the Pasadena Branch office.
- Worked closely with other business lines to capture new client relationships.
- Leveraged networking opportunities to expand client base and existing relationships through the Northern Anne Arundel County Chamber of Commerce, the Pasadena Business Association, the Lake Shore Rotary and the Pasadena BNI Chapter.
- Counseled corporate clients and high net-worth individuals with regard to their borrowing needs.
- Cross-sold banking services and products to clients.
- Participated in community events to position the bank as a leader within the territory.
- Cross-sold products ans services by referring clients to other lines of business within the company.
- Managed audit, compliance and security standards.

## EDUCATION AND TRAINING

**Maryland Banking School**: Banking, 08/2013

**Maryland Bankers Association**

- Graduated with Honors

**High School Diploma**: 05/1997

**Laurel High School** - Laurel, MD

Business Administration

**Anne Arundel Community College** - Arnold, MD

Nursing

**Savannah Technical College** - Savannah, GA

## ACCOMPLISHMENTS

- Lead the Veterinary Campaign as a champion for targeting new Veterinary relationships.
- Equity award recipient for Top Business Banker 2014-2019
- Experience Champion Ambassador
- Strategic Thinking Leaders Pilot Program. Group that resulted in implementations of changes to Employee Town Hall Meetings and Remarkable Manager Orientation origination, and more
- Recognized at multiple Presidential recognition events for being a top performer in loan production, client compliments and number of new services with new relationships.
- Serve on multiple committees for the Northern Anne Arundel Chamber of Commerce, Pasadena Business Association and BNI TWIN Award recipient-2018
- Maryland Bankers Association- Next Leaders in Banking Award- 2013
- NAACCC- Chair of Signature Event- Presidential Gala Committee and the Women Who Make a Difference events.
- Career Pathways Program Mentor
- Represented the Bank as a panelist on several business banking topics, to include access to capital, and growing your network.