

PAYTON WEBSTER

SKILLS

- Data Analysis · FRS ·
- Customer Interaction ·
- Loan Applications ·
- Personal Financial Management

EDUCATION

Financial Analysis, Risk and Portfolio Management

Northwestern University

2006 - 2010 Illinois

Business Analysis, Requirements Gathering, Commercial Awareness, Modelling Business Processes.

(ISEB) British Computer Society

1999 - 2000 online

STRENGTHS

Detail-oriented

Data-driven individual who always relies on hard data. Accuracy is key for making the right decisions.

Delivering Results

Focus on the key inputs and deliver them with the right quality and in a timely fashion.

Problem-solver

Emphatic towards the problems of other people. I take time to understand issues at the root cause and work with clients to solve them.

Personal Banker

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📍 Hickory Hills, IL

SUMMARY

Banking professional with data-driven mindset and client management skills. Experienced in asset management, credit analysis, and investment portfolio management.

EXPERIENCE

Personal Banker Assistant

2016 - Present

Springfield, IL

Renaud

Renaud is an asset management and broker service provider.

- Constantly awarded for having 100% Customer Service Surveys
- Implemented improved customer service processes, reducing refunds and customer dissatisfaction by 50%.
- Opened accounts with a cross sale ratio of 4 products opened.

Account Executive

2009 - 2012

Thompson Ltd

Springfield, IL

Thompson Ltd is a multinational financial services company.

- Q1 2010 - Awarded Top Performer.
- Have achieved the targets 75% of times every year.
- Closed \$200k worth of consumer loans.

Finance Advisor

2008 - 2009

Boyle Ltd

Springfield, IL

Boyle Ltd is a financial services provider in corporate banking, retail banking, investment banking, treasury, private banking, and asset management.

- Managed pipeline in excess of \$300k (Salesforce CRM)
- Certified with IBF CACS Papers 1 & 2, CMFAS 1B, 5, 6A, 8A, 9, 9A, HI
- Maintained monthly customer service score at 100%

Credit Analyst

2006 - 2008

Schmeler

Springfield, IL

Schmeler is an international bank providing a full suite of banking services.

- Managed and grew 350 Remote Portfolio (inactive) client accounts as part of a new initiative.
- Appreciated by Audit Team for preventing fraud.
- Surpassed monthly quota of educating and on-boarding clients to Digital Engagement platform by 110%.