

Zackary Waller

Personal Banker



Skills



Financial services



Banking



Financial advisement



Portfolio assessment



Sales expertise

About Me

An accomplished Personal Banker who is driven to increase branch revenue through innovative sales strategies. Adept in client relationship building with in-depth knowledge of financial product and business assessment expertise.

Working Experience

Personal Banker | Ultimate Bank, Tokyo

05/2022 - Present

- Assisted customers with setting up or closing accounts, completing loan applications, and signing up for new services.
- Helped clients plan for and fund retirements using mutual funds and other options to manage, customize and diversify their portfolios.
- Built 16 referral business opportunities in 2019, expanding the consumer and small business client base.

Licensed Personal Banker | Great Finance, Osaka

09/2019 - 04/2022

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Education

Bachelor of Accounting and Business Management

University of California, Los Angeles

2015-2019



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