Royce Lopez

Banker

Personal Info

Phone
916-566-6124

E-mail
royce.z.lopez@gmail.com

Summary

Experienced banker with excellent mathematical and analytical skills as well as a devotion to customer service. Maintained 90% satisfaction rate from banking customers for 15 months straight. Proposed changes to account opening procedures led to a 15% drop in wait time and processing errors. Looking to leverage banking skills at Merrill National.

Skills

Ability to work under pressure
●●●●●

Financial planning
●●●●○

Risk assessment
●●●●●

Customer service
●●●●○

Problem solving
●●●●○

Investment management
●●●●●

Technical skills
●●●●○

Negotiation
●●●●○

Interpersonal skills
●●●●●

Experience

2016-12 - 2019-12

Banker

RJ Savings and Trust

- Effectively managed corporate client portfolios and offered financial advice regarding investments and savings.
- Performed financial risk assessments and studied banking and financial market trends to prepare activity and progress reports to management.
- Trained and supported 12+ new bank tellers.
- Sold and redeemed U.S. Savings Bonds applications to the Federal Reserve as necessary.

Key achievement

- Designated primary middle market banking representative after 6 months on the job. Middle market banking revenue up 10% quarterly since then.

2015-09 - 2016-12

Associate Banker

Merriweather Bank

- Reviewed and processed credit and loan applications according to best practices and law.
- Supported identifying potential sales opportunities to new business clients.
- Handling daily reconciliation of payments as well as maintaining incoming and outgoing cash records.

Key Achievement

- Earned "Banker of the Quarter" twice for excellence and professionalism in banking.

Education

2011 - 2014

B.A. in Economics

University of North Dakota

- President of the student business and finance club for 1 year

Certificates

- Certified Financial Planner (CFP)
- Certified Financial Analyst (CFA)
- Chartered Mutual Fund Counsellor (CMFC)