

# Jessica Claire

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## Summary

Successful banking professional with unsurpassed attention to detail and superior ethics. Focused on balancing customer needs with the banks sales target goals. Dedicated to building and strengthening customer relationships.

## Skills

- Customer Service
- Proactive and Focused
- Relationship Building
- Prioritizing and Planning
- Sound Judgment
- Time Management

## Experience

**Business Banking Administator**, 07/2021 to Current

**First National Bank Texas** – Dallas, TX

- Supported commercial loan team in clerical tasks and loan processing duties.
- Assisted loan officers with application data acquisition and verification.
- Examined and verified information in loan application and closing documents.
- Prioritized and organized tasks to efficiently accomplish service goals.
- Juggled multiple projects and tasks to ensure high quality and timely delivery.

**Senior Personal Banker**, 10/2019 to 7/2021

**Crossfirst Bankshares, Inc.** – Dallas, TX

- Built strong rapport with new and existing clients to better serve financial needs and promote branch loyalty.
- Partnered with loan and mortgage officers and financial advisors to provide clients with optimal financial solutions.
- Helped customers open and close accounts, apply for loans and make sound financial decisions.
- Processed sales referrals and promoted bank services and products, resulting in 40% branch sales increase.

**Personal Banker**, 05/2012 to 10/2019

**Bancfirst Corporation** – Mustang, OK

- Helped customers open and close accounts, apply for loans and make sound financial decisions.
- Built strong rapport with new and existing clients to better serve financial needs and promote branch loyalty.
- Partnered with loan and mortgage officers and financial advisors to provide clients with optimal financial solutions.
- Surpassed annual quota by 140% in Sales.
- Consistently met service team sales targets and call handling quotas consistently.

**Teller Supervisor**, 5/2011 to 5/2012

**University Of Miami Miller School Of Medicine** – Coral Gables, FL

- Supplied tellers with coin and currency.
- Maintained optimal financial controls by securing funds and making accurate transactions.
- Verified transactions involving cashier’s checks, money orders and account transfers.
- Managed and balanced cash vault, audits and general ledger accounts.
- Promoted facility security by monitoring customer behaviors and following established protocols to protect individuals and assets.

**Office Assistant**, 07/2008 to 04/2011

**Keysight Technologies** – Washington Dc, VA

- Updated financial, customer and business records in company databases.
- Organized files, developed spreadsheets, faxed reports and scanned documents to bolster organizational workflow.
- Collected payments, issued receipts and updated accounts to reflect new balances.
- Offered diverse clerical support to office team members, managed correspondence, answered telephone calls and tracked documentation.
- Maintained business records by updating customer information.

**Customer Service Rep/Floor Support Supervisor**, 08/2007 to 01/2008

**Emerson Hospital** – Bedford, MA

- Respond to customer contacts received from incoming calls Respond to customer contacts received from emails Handle problems, questions, or situations for customers Accurately enter customer information
- Trained staff to provide excellent customer service to challenging customers.
- Monitored team of 16 Customer Services Representatives to assess knowledge, tone and adherence to company policy.

**Customer Service**, 03/2005 to 02/2007

**Dick Blick Art Materials** – City, STATE

- Answer incoming calls; Customer problem solving Work with drop ship vendors; Process vendor charge backs File damage and loss claims with freight carriers
- Answered customer questions about products and services and recommended appropriate solutions.
- Reviewed customer complaints to determine appropriate methods for resolution.

**Lead Teller/Personal Banker**, 07/1997 to 03/2005

**Wells Fargo Bank, NA** – City, STATE

- Supervise the teller staff and train new employees Maintain Security and Control manuals Monitor incoming and outgoing cash for the vault Customer problem solving/ Develop and maintain relationships Prepare loan documents and set up closings.

**Unit Secretary**, 04/1994 to 07/1997

**St. Mary Medical Center** – City, STATE

- Register patients/Answer incoming calls Order lab work and X-rays/ Initiate and Manage Trauma Alerts Enter patient charges for billing Schedule outpatient procedures and admissions
- Conducted patient intake interviews to collect medical information and insurance details.

## Education and Training

**Medical Terminology EMT-B State of Illinois**: 01/2001

**Carl Sandburg College** - Galesburg, IL

GPA: 3.5

**Business**

**Carl Sandburg College** - Galesburg, IL

## Accomplishments

- Exceeded sales goals by an average of 140% in 1 year
- Promoted to Senior Banker due to Sales and achieved and surpassed my annual goals.