

# JESSICA CLAIRE

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## SUMMARY

Results-oriented banking professional experienced in handling customer needs. Skilled at maximizing client satisfaction and bank profits by utilizing persuasive communication skills, in-depth product knowledge and hands-on customer service abilities. Additionally, a Personal Banker focused on satisfying customers by providing high-quality service. Determined and dedicated to exceeding mandates. Eager to take on higher responsibilities. Furthermore, a dedicated Banker well-versed in setting up new customer accounts, following security protocols and assisting with audits. Well-organized with strong relationship-building, time management and documentation skills. Finally, a recent graduate with excellent research, technical and problem-solving skills. Detail-oriented and able to learn new concepts quickly.

## SKILLS

- Works well with others
- Analytical Thinking
- Proficient in using Microsoft Office Platforms
- Relationship Building
- Product Promotion
- Cross-Selling and Partner Referrals
- Bank Sales
- Customer Service
- Verbal and Written Communication
- Account Closing Process
- Promoting Products
- Opening Accounts
- Inbound Customer Calls
- Closing Procedures
- Check Cashing and Withdrawals
- Investment Management
- Team Collaboration
- Money Handling
- Customer Service-Oriented

## EXPERIENCE

- 02/2022 to Current

Personal Banking Advisor

Charles Schwab Corporation – Fairlawn, OH

  - Helped customers open and close accounts, apply for loans and make sound financial decisions.
  - Followed operational standards, promoting security, risk management and compliance.
  - Built strong rapport with new and existing clients to better serve financial needs and promote branch loyalty.
  - Educated customers on variety of retail products and digital solutions, enhancing customer experience.
  - Assisted and advised customers on using online and mobile banking systems.
  - Maintained position of trust and responsibility by keeping customer business confidential.
  - Expanded customer relationships by maintaining regular follow-up processes and rapport.
  - Met with customers to analyze financial needs and maximize sales opportunities.
  - Used job-related software and computer to collect and record customer deposits, fees and issue receipts.
  - Prepared bank deposits, general ledger postings and statements.
  - Informed customers of procedures for depositing checks and applying for ATM cards.
  - Reconciled cash and checks against computer records at end of shift.
  - Completed daily cash balancing and operated ATMs.
  - Trained and coached less experienced team members in procedures, compliance standards and performance strategies.

10/2020 to 10/2021

Financial Services Professional

New York Life Insurance Company – City, STATE

- Expanded customer relationships by maintaining regular follow-up processes and rapport.
- Described promotional offers and used persuasive sales techniques to upsell services and convince clients to apply for additional banking services.
- Partnered with loan and mortgage officers and financial advisors to provide clients with optimal financial solutions.
- Held financial conversations with clients and prospects to determine needs and provide appropriate solutions.
- Established strong and positive working relationships within organization to contribute to team success.
- Interviewed clients to determine income, expenses, financial objectives and risk tolerance in order to develop successful financial plans.
- Maintained friendly front-line coverage by greeting and assisting walk-in customers, promoting good first impressions with clients.
- Discussed financial needs and goals to present investment options aligned with clients' financial status.
- Received and processed deposits, withdrawals and loan payments, keeping financial records up-to-date.
- Engaged in ongoing training and education to acquire knowledge of financial products and services in changing economic conditions.

10/2016 to 10/2020

Structural Apprentice

United States Air Force, USAF – City, STATE

- Served in two deployments to assist the Air Force with building and maintaining military bases
- Assisted and worked with fellow Airman to complete missions stateside and overseas.
- Worked closely with mentors to understand project objectives.
- Maintained organization, cleanliness and safety in work areas.
- Completed semi-skilled and skilled work under supervision of fully qualified professionals.
- Embraced ongoing education and learning opportunities to develop new skills.
- Shadowed craft experts and supervisors to learn wide range of simple and complex techniques.
- Assisted colleagues in accomplishing planned procedures or activities to increase productivity.
- Completed workshops and off-the-job training to achieve job competencies.
- Prepared construction sites, materials and tools for specific projects and loaded and unloaded equipment and products.
- Engaged in preparation work to ready worksite for installers.
- Followed company and governmental health and safety regulations and trained new team members.
- Assisted tradesmen and machine operators in construction projects.
- Removed, filled or compacted earth.

## EDUCATION AND TRAINING

- 03/2022

Bachelor of Arts: Finance

University of Arizona Global Campus

Dean's List, GPA: 3.6, Point Average