



Nicholas Peterson

Personal Banker

Details

Address

55 Greenland Street
Norwalk, CT 06850
United States

Phone

203-456-8989

Email

ptrsn_nch7@gmail.com

Skills

Adaptability



Knowledge of Banking Software



Marketing and Sales



Customer Service



Financial Management



Mathematical Skills



Languages

English



Spanish; Castilian



Profile

Highly dynamic and attentive personal banker with 10+ years of experience helping clients to make responsible and beneficial financial decisions while effectively working to support all branch operations.

Employment History

Personal Banker, TD Bank

Feb 2017 – Sep 2021 📍 Norwalk

- Developed strong relationships with current and prospective clients, as well as business partners.
- Ensured compliance with operational, risk, security and audit procedures and policies.
- Assisted clients by providing exceptional customer service and knowledge of products, services and offerings.
- Accurately and efficiently processed 100+ transactions a day.
- Maintained the confidentiality of clients and their accounts at all times.
- Followed policies and procedures to minimize risk.

Personal Banker, Unity Bank

Jun 2011 – Jan 2017 📍 West Hartford

- Worked to provide an exceptional client experience on a daily basis.
- Cultivated strong relationships with partners, small businesses and personal wealth management professionals.
- Maintained a strong understanding of Unity Bank's policies, standards and procedures to ensure the security of bank and client assets.
- Assessed risks during business decisions, and helped clients to make the safest and most beneficial financial choices possible.
- Recognized the transaction needs of clients and educated clients about digital self-service options.

Education

Molloy College, Bachelor of Science in Mathematics

Sep 2007 – May 2011 📍 Rockville Centre

Long Island City High School, High School Diploma

Sep 2003 – Jun 2007 📍 Queens, NY