

FIRST NAME LAST

NAME

Address • City• Zip • Cell Phone • email

BANKING PROFESSIONAL

Commercial Banking / Corporate Banking

Repeatedly hailed by senior management and clients for customer service and sales results beyond expectations

Multi-award-winner offering an 11-year track record of consistent top performance in challenging roles with 2 of Canada's largest financial institutions. Expert qualifications in identifying market opportunities to accelerate expansion, increase revenues, and improve profit contributions. In-depth knowledge of commercial credit products (Lines of Credit, Term Loans, Letters of Credit, Foreign Exchange, and Term Deposits & GIC's) and the Canadian Small Business Financing Act. Advanced user of Word, Excel, and Moody's software. Possess the willingness and initiative to work extra hours in guaranteeing that time-critical deadlines are met. **Added Value:**

Client Relationship-Building, Loyalty, & Retention • Business Development & Growth Strategies • CDIC Compliance
Team-Building / Mentoring & Leadership • Pricing, Fee, Term, & Conditions Negotiations
Project Finance Market (P3) Penetration • Account Management & Review

RELEVANT EXPERIENCE

Bank Name - Select locations in the G.T.A. • Title - Commercial Banking Date
Joined Branch after they relocated operations to larger premises based on its desire to gain a competitive foothold serving an ever-growing population. Oversee a portfolio of 25 accounts ranging in value from \$0.5 million to \$25.0 million.

Significant Contributions:

- On at least 8 occasions, ranked "Top Performer" status for signing up a minimum of \$2.5 million in new booked business
- Between Date and present day, improved ROE from 18% to 30%
- Continue to lead a 20-person team as Bank rolls out its strategic plan on how to double its portfolio by Date
- Nominated for the "Up and Coming" Award citing tireless energy and contagious enthusiasm when interacting with clients, staff, and management

Company Name - City • Title Date
Initially hired as a Direct Banking Manager (Personal Accounts); promoted just 2 years later to support as many as 3 Account Managers overseeing activity in 5 locations as Company enjoyed a fairly steady growth mode. Reviewed, underwrote, and structured commercial credit files valued at up to \$1.5 million; subsequently forwarded these files to the Credit Dept. for approval.

Significant Contributions:

- Underwrote and approved between 12 and 15 industry-specific applications per month (including agricultural, retail, real estate, oil & gas, manufacturing, and hospitality) across Canada - easily 25% higher than the industry average
- Typically approached by senior management to assist in training new-hires so they were better equipped to handle diverse industry activity
- Regularly tapped to parlay subject matter expertise in applications underwriting and approval (plus deep knowledge of the agriculture, retail, real estate, oil & gas, manufacturing, and hospitality sectors) on conference calls attended by as many as 20 participants in 10 branches
- Co-delivered dry training runs on SIEBEL to teams of up to 20 when the Bank converted its customer database information tracking
- In response to original system's retirement, conceived the idea of 30 team members monitoring their own sales activity to bring overall congruity to this otherwise detail-driven initiative
- Bestowed lending limits of up to \$0.25 million during both personal and commercial lending tenure - the highest the department would allow
- Maintained an "A" average in monthly loan results for all 7 years

EDUCATION

Completed courses focusing on Sales, Relationship Management, and Financial Analysis
College Name – Campus Name, City - Diploma Name

Ongoing Date