

Private Client Banker/Officer

ROBERT SMITH

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Address: 1737 Marshville Road,
Alabama.

Objective

Experienced financial operations professional with extensive communication skills. Over 8+ years in banking, investments, and financial services. Consistent leader in performance management.

Skills

Sales Banking Investments Mutual Funds Fixed Annuities.

Work Experience

Private Client Banker/Officer

JP Morgan Chase - May 2015 - 2020

- Responsible for \$10 million USD portfolio in investments and deposit balances.
- Appointed AXA, Nationwide, TransAmerica, John Hancock.
- Extensive industry knowledge in checking & savings accounts, home mortgages, investment banking, and credit origination and servicing.
- Reporting for clients and account analysis using various reporting tools.
- Licensed to sell mutual funds, variable and fixed annuities.
- Build and maintained strong relationships with new and existing clients.
- Adhered to all banking and FINRA regulations and provided an excellent customer experience.

Private Client Banker

Delta Corporation - 2014 - 2015

- Responsible for developing and managing relationships with high net-worth clients for the retail and private banks services and solutions.
- Previously spear-headed the growth of deposits and investments for new-build branches in Flower Mound and Tampa, FL.
- Qualified for 2012 National Sales Conference and The National Achiever Award.
- Series 6, 63 Licensed Work Exclusively with High Net Worth Clients Small Business Specialist Responsible for Handling a Book of Over 150 Versed in .
- Work with High Net-worth clients with assets over \$1M for Chase Private Client Proven experience in establishing and maintaining long-lasting .
- Hired as 1st Private Client Banker in Beverly Hills to open and market Chase Private Client, a companywide initiative offering wealth management .
- Manage banking relationships through advice-based approach, ensuring clients get the best products and services for their needs.

Education

Bachelors of Arts - 2003(The Ohio State University - Columbus, OH)