

# JESSICA CLAIRE

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## SUMMARY

Talented Financial Executive successful in managing highly effective teams with a focus on account service and retention. Detail-oriented financial professional with 17 years of industry experience. Persuasive communicator with proactive approach to resolving account and customer service issues. Award winning financial leader and innovator in digital banking.

## SKILLS

- Excels in team leadership
- Account analysis expertise
- Expert in risk management
- Investment guidance
- Employee training
- Client relationship management
- Reliable
- Customer and vendor relations
- Excellent communication skills
- Cost and budget analysis
- Financial analysis and planning
- Safety protocol
- Energetic
- Strong interpersonal skills
- Key performance indicators
- Multilingual in: Portuguese, English, Spanish
- Strategic planning
- People-oriented
- Dependable
- Multi-tasking ability
- Regulatory compliance
- Staff supervision
- Excellent work ethic
- Risk analysis
- Excellent time management skills

## EXPERIENCE

### 01/2014 to 01/2021 Digital Branch Manager

Nbkc Bank – Kansas City, MO

- Maximized branch revenue by optimizing daily operations.
- Boosted customer base, acquiring new customers and identifying needs to deliver relevant products.
- Evaluated budget plans and current costs to project trends and recommend updates.
- Monitored more than 700 client relationships per Month.
- Monitored more than 20 client relationships per monthly.
- Produced sales by executing complete sales cycle process from prospecting through contract negotiations and close.
- Developed annual branch business plan for maximum profitability and effectiveness.
- Worked with regulatory representatives to complete accurate filings and maintain compliance.
- Analyzed applicants' financial status, credit and property evaluation to determine feasibility of granting loans.
- Educated customers on variety of loan products and available credit options to promote valuable decision-making.
- Complied with company policies and government regulations to prevent and detect rule violations and protect organization from fines and lawsuits.
- Planned and coordinated risk mitigation strategies to protect company assets.
- Built strong rapport with new and existing clients to better serve financial needs and promote branch loyalty.
- Oversaw branch team with 4 customer service representatives and 16 personal bankers and implemented training for all new employees.
- Designed sales and service strategies to improve revenue and retention.
- Received Top Digital Branch in Brazil 2019.
- Increased efficiency and drove branch revenue by optimizing daily operations.
- Assessed employee performance and issued disciplinary notices.
- Coordinated special update and conversion projects and monitored key performance metrics.

### 01/2010 to 01/2014 Relationship Manager

Advisors Excel – Topeka, KS

- Reviewed and analyzed client financial data to plan proposals.
- Presented product and service details at various events to increase customer base.
- Enticed clients to accept wealth management proposals to increase monthly business.
- Provided information on technology resources to improve clients financial well-being.
- Streamlined communication efforts by measuring client satisfaction metrics.
- Achieved client loyalty through quality, productivity, service and proactive management.
- Drafted monthly summaries to review level of client participation and identify targets for follow-up calls.
- Managed [Number]+ regular [Type] customers.
- Built long-term relationships with lucrative clients by utilizing active listening, effective communication and dynamic interpersonal skills.

• Brought in \$[Amount] in new business in [Year] and over [Number] new clients in collaboration with branch financial advisors and support staff.

• Addressed inquiries from clients and relationship management department team members.

• Developed and enhanced client relationships by leveraging exceptional [Type] expertise.

• Promoted strategies for enhancing credit management processes, including processing loan documentation and maintaining compliance with [Type] standards.

• Maximized and maintained client satisfaction in all aspects of credit management.

• Supervised \$[Amount] [Number]-client portfolio of high net worth individuals, building rapport and relationships through consistent quality interactions.

### 03/2008 to 01/2010 Relationship Banker

Pnc Financial Services Group, Inc. – Kalamazoo, MI

- Modified, opened and closed customer accounts.
- Advised customers on bank products, services and financial planning options.
- Improved decision-making by using current data on market conditions and individual financial situations.
- Completed loan servicing procedures to assess compliance with bank and regulatory terms and conditions.
- Drafted monthly summaries to review level of client participation and identify targets for follow-up calls.
- Addressed inquiries from clients and relationship management department team members.
- Made continuous business adjustments to improve branch operations.
- Completed thorough and accurate documentation for all money movements, deposits or withdrawals.
- Adhered to bank and legal guidelines for reporting, loan approvals, and money handling.
- Developed culture of success rewarding performance, productivity and sales results.
- Handled a portfolio of customers and reviewed accounts for signs of discrepancies, fraud or non-payment issues.
- Cultivated positive relationships with key stakeholders and decision-makers as part of successful business practices.

• Met or exceeded sales goals by promoting bank products and services in every interaction.

• Maintained optimal financial controls by securing funds and making accurate transactions.

• Helped customers open and close accounts, apply for loans and make sound financial decisions.

• Met with new clients and completed pre-qualification procedures.

• Assessed financial means and desires of each client in order to set up appropriate mortgage packages.

• Put together and executed loan documents.

• Customized products and services to meet specific banking requirements.

• Developed and oversaw events to bring in customers and promote products.

### 05/2004 to 02/2008 Business Manager

The University Of Oklahoma – Norman, OK

- Mitigated financial discrepancies to maintain company's good financial standing.
- Analyzed regional market trends to distinguish best courses of action for company.
- Designed detailed business plans to outline finances, goals, and operations of company.
- Cultivated relations with customers and dealership personnel to drive client retention and long-term growth initiatives.
- Represented integrity and professionalism in all areas of business, serving as mentor and role model to staff.
- Strategized long-term business needs, driving customer feedback for process improvements.
- Directed negotiation and preparation of all contracts.

## EDUCATION AND TRAINING

### 06/2012

MBA: Business Management

Mackenzie Presbyterian University - Sao Paulo, Brazil

- Ranked in Top 10% of class
- Completed coursework in Business Management with an emphasis in leadership.

### 06/2007

BBA: Business Administration

Integrated College Rio Branco - Sao Paulo, Brazil

### 02/2020

CPA20: Finance Certification

ANBIMA - Sao Paulo, Brazil

### 04/2020

Development in Emotional Intelligence

CONQUER - United States (Online)

### 01/2021

Successful Career Development

University Of Georgia - United States (Online)

## ACCOMPLISHMENTS

- Won Top Digital Agency - Brazil award for 2019.
- Selected to participate in the Beta Launch of Itau Personalte's first digital branch. Designed to cater to the high income segment of Brazil.
- Responsible for the Evolution of 5% of the NPS (Net Promoter Score) indicator of customer satisfaction.

• Winner of the Raising Campaign - 2019

• Digital Branch awarded for Credit - 2018

• Award for Credit Recovery Campaign - 2018

• Led team to achieve several, earning recognition from upper management and financial reward.

• Recognized as Leader of the Month for outstanding performance and team contributions on numerous occasions.

• Consistently maintained high customer satisfaction ratings.