

# Royce Lopez

## Banker

Experienced banker with excellent mathematical and analytical skills as well as a devotion to customer service. Maintained 90% satisfaction rate from banking customers for 15 months straight. Proposed changes to account opening procedures led to a 15% drop in wait time and processing errors. Looking to leverage banking skills at Merrill National.

### Personal Info

**Phone**  
916-566-6124

**E-mail**  
royce.z.lopez@gmail.com

### Skills

Ability to work under pressure	●●●●●
Financial planning	●●●●○
Risk assessment	●●●●●
Customer service	●●●●○
Problem solving	●●●●○
Investment management	●●●●●
Technical skills	●●●●○
Negotiation	●●●●○
Interpersonal skills	●●●●●

### Experience

2016-12 - 2019-12	<b>Banker</b> <i>RJ Savings and Trust</i> <ul style="list-style-type: none"><li>Effectively managed corporate client portfolios and offered financial advice regarding investments and savings.</li><li>Performed financial risk assessments and studied banking and financial market trends to prepare activity and progress reports to management.</li><li>Trained and supported 12+ new bank tellers.</li><li>Sold and redeemed U.S. Savings Bonds applications to the Federal Reserve as necessary.</li></ul> <b>Key achievement</b> <ul style="list-style-type: none"><li>Designated primary middle market banking representative after 6 months on the job. Middle market banking revenue up 10% quarterly since then.</li></ul>
2015-09 - 2016-12	<b>Associate Banker</b> <i>Merriweather Bank</i> <ul style="list-style-type: none"><li>Reviewed and processed credit and loan applications according to best practices and law.</li><li>Supported identifying potential sales opportunities to new business clients.</li><li>Handling daily reconciliation of payments as well as maintaining incoming and outgoing cash records.</li></ul> <b>Key Achievement</b> <ul style="list-style-type: none"><li>Earned "Banker of the Quarter" twice for excellence and professionalism in banking.</li></ul>

### Education

2011 - 2014	<b>B.A. in Economics</b> University of North Dakota <ul style="list-style-type: none"><li>President of the student business and finance club for 1 year</li></ul>
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### Certificates

- Certified Financial Planner (CFP)
- Certified Financial Analyst (CFA)
- Chartered Mutual Fund Counsellor (CMFC)