

PERSONAL BANKER RESUME

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OBJECTIVE

Results-driven leader with 5+ years of experience and a high level of business acumen. Highly productive with a record of achieving all set targets. Proactive in establishing a cooperative business climate across multiple departments and levels. Seeking to develop constructive client relationships and achieve [Company Name's] organizational goals.

PROFESSIONAL EXPERIENCE

Personal Banker

Sep 2019–Present

BANK OF AMERICA - Chandler, AZ

- Ascertain customers' needs and goals by providing appropriate tailor-made solutions while offering guidance and investment advice
- Manage 60+ new and existing customers by helping them open and customize new checking and savings accounts
- Refer clients to in-house financial experts when necessary by presenting financial products and services to existing and prospective customers
- Identify potential customers and turn 80% of prospects into signed customers, generating over \$1M in annual revenue
- Maintain knowledge and understanding of appropriate banking legislation and regulations by keeping up-to-date with market updates and financial news to provide the best possible service

Personal Banker

Jun 2016–Aug 2019

WELLS FARGO - Chicago, AZ

- Reviewed power of attorney documents, trust accounts, estate accounts, and administered retirement plans
- Advised 30+ customers by explaining the types of financial services available and educated them on investment options and risks
- Ensured the firm was in tune with all recent trends and systems by managing various products and observing market trends, resulting in expanding the firm's targets and recording a 15% increase in revenue opportunities
- Handled business credit requests of over \$300K and helped customers to find other lending opportunities

EDUCATION

Bachelor of Science in Business Management

May 2016

Honors: *summa cum laude* (3.85/4.0)

UNIVERSITY OF PHOENIX - Phoenix, AZ

ADDITIONAL SKILLS

- Expert in Microsoft Office
- Critical thinking skills
- Attention to detail
- Account management
- Training and mentoring
- Customer relationship management software (CRM): Salesforce, Creatio, Microsoft Dynamics 365