

Robert Smith

Personal Banker/Assistant Manager

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SUMMARY

Experienced Personal Banker/Assistant Manager with a successful career in insurance, mortgage lending, investment sales, retail banking, business development, and administration. Excels at cultivating productive relationships with partners such as Business Bankers, Financial Advisors, and Mortgage Loan Officers by identifying qualified opportunities to ensure company goals are exceeded. Utilizes proactive approaches in community involvement, networking, and customer relationship management in order to maintain, expand and acquire client base.

SKILLS

Proficient With Microsoft Office Programs, Computer Work, Typing, Data Entry, Business Development, Customer Service, Sales Management, Business Analysis, Strategic Planning

WORK EXPERIENCE

Personal Banker/Assistant Manager

ABC Corporation - October 2012 - February 2014

- Provided remarkable customer service through all customer interactions, opening new accounts, problem resolution, telephone answering, safe deposit access, etc.
- Consistently top banker in the district for mortgage referrals developed an in-depth knowledge of retail and business products and services.
- Sold loans and deposit products to consumer and small business customers and prospects.
- Conducted outbound calls by using referral sources, walk-in sources, telephone, and in-person calls.
- Used all sales tools, including profiling customers needs through the use of various technologies and sales tools to ensure a consistent and valued customer experience.
- Provided transactional customer service, including but not limited to the following accepted and processed deposits, withdrawals, and payments and handled other over the counter and mail transactions.
- Successfully completed banker and teller platform training assisted in the coaching and cross-training of other staff members in sales and operations as needed.

Licensed Personal Banker & Registered Representative

ABC Corporation - March 2010 - September 2011

- Directed daily operations for the retail bank, including branch sales, business development, and customer service.
- Analyzed financial statements and pertinent information to determine the creditworthiness of prospective customers.
- Counseled corporate clients and high net-worth individuals with regard to their borrowing needs.
- Maintained meaningful relationships with customers by resolving their issues and engaging them to understand their financial needs.
- Partnered with the branch team and specialists to connect the customers to experts who can help with specialized objectives.
- Complied with all policies, procedures, and regulatory banking requirements.
- Established positive relationships with management to facilitate communication and collaboration between all employees.