Personal Banker

ROBERT SMITH

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Objective

9 years of experience as a Banker. Experienced in retail and business banking with a demonstrated history of working in the financial services industry.

Skills

Customer Service, Bank Teller, MS Office Suite, Risk Management, Credit, Banking, Accounts Receivable And Accounts Payable.

Work Experience

Personal Banker

Wells Fargo Bank, NA - September 2014 – August 2018

- Relationship management with existing and new business customers to grow sales, revenue, and market sales.
- Acquires and/or expands and retains business, retail, private and wealth client relationships to generate revenue and deepen relationships. Handles the origination, financial analysis, negotiation and documentation of credit and non-credit products and services.
- Manages risk/return and drives quality for new and/or existing business, retail, private and wealth customers. Actively identifies and mitigates different types of risk, such as regulatory and operational.
- Focuses on client opportunities by providing and recommending the business, retail and private products based on an understanding of the clients needs and their financial well-being. Focuses on increasing client engagement and loyalty.
- Builds an effective network of internal and external relationships, such as community relationships, to actively acquire new clients and/or expand existing clients and enhance the client experience. Focuses on bringing an entire bank to the client by presenting the full range of products and services. Leverages reporting and sales tools to proactively identify and successfully convert sales opportunities.
- Provide support to the relationship managers with anti-money laundering policies and other customers.
- Help the community, retail, business, private and wealth customers to commit to the highest ethical standards and maintaining their valued trust.

Relationship Banker

Bb&t Bank - December 2009 – September 2014

- Serve as primary contact for new account openings and cross sale of other products and services to clients and prospects.
- Proactively and reactively contact clients and prospects daily by phone or in person to identify additional client financial needs and strengthen client relationships.
- Support team sales process by acting upon or referring identified client needs to other lines of business, including but not limited to, retail loan, mortgage, investments, private banking, insurance, small business, merchant services, and other areas.
- Calling customers, inbound and outbound calls, cross-sell financial products and deepen existing relationships with retail, business and private and wealth clients.