

# 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