

Dion Ross

Clifton, NJ

-Email me on Indeed: <http://www.indeed.com/r/Dion-Ross/28c65e98d2fb3d19>

Work Experience

Private Client Banker, AVP

JPMorgan Chase & Co - New York, NY

August 2011 to January 2022

- Recognized as a 2-time National Achiever, ranking among the top 200 Private Client Bankers in the country for consistently achieving exceptional sales and performance success in 2018 and 2020.
- Demonstrated sales prowess, utilizing prospecting, negotiation, and closing skills to drive business growth and manage a portfolio of 450 household relationships.
- Delivered in-depth and strategic counsel to Private Clients, providing intricate insights into diverse banking services, lending alternatives, and investment strategies, resulting in sustained loyalty and enduring relationships.
- Cultivated strong and lasting customer relationships by employing a collaborative, team-based approach to deliver tailored investment solutions, lending capabilities, and identify opportunities for deposit growth.
- Achieved over 10% annual growth in AUM through nurturing existing and establishing new client relationships.

Registered Representative/Agent/Stockbroker

John Thomas Financial - New York, NY

February 2010 to July 2011

- Proactively cultivated exceptional communication skills through telephone prospecting, successfully establishing new client relationships and expanding the client base.
- Demonstrated proficiency in identifying typical transaction structures and key risk allocation principles to drive successful outcomes.
- Executed buy and sell orders of securities on behalf of clients, ensuring the prompt and accurate execution of transactions.
- Established a track record of illustrating a high level of personal initiative, setting and achieving challenging goals, while demonstrating entrepreneurial leadership.
- Educated clients on investment products, market dynamics, and financial concepts, providing clear and comprehensive explanations to support informed decision-making.

Registered Representative/Agent/Stockbroker

National Securities Corp / B Riley Financial - Huntington, NY

June 2006 to February 2010

- Proactively cultivated exceptional communication skills through telephone prospecting, successfully establishing new client relationships and expanding the client base.
- Demonstrated proficiency in identifying typical transaction structures and key risk allocation principles to drive successful outcomes.
- Executed buy and sell orders of securities on behalf of clients, ensuring the prompt and accurate execution of transactions.

- Established a track record of illustrating a high level of personal initiative, setting and achieving challenging goals, while demonstrating entrepreneurial leadership.
- Educated clients on investment products, market dynamics, and financial concepts, providing clear and comprehensive explanations to support informed decision-making.

Education

Bachelor's degree in Finance

CUNY Bernard M Baruch College - New York, NY
January 2018 to June 2023

Skills

- Communication skills