

PERSONAL BANKER(SAFE)1 AND BUSINESS ADVOCATE

Profile

Skilled and awarded Personal and Business Banker whose talents shine in a competitive, innovative and creative environment. Track record of exceeding sales goals, improving client retention and growing customer base. Team player who truly believes in providing clients with the utmost client experience. Has a contagious energy that surrounds the environment she works in. Experienced in high-volume, multi-unit, retail and business operations. Desires a high-level position in a professional corporate environment.

Core Accomplishments

- Top Personal Banker and Business Advocate in the District
- Received The Star Credit Award
- Received The National Achiever Banker Award
- Received numerous awards for exceeding sales goals and customers satisfactions.
- Received Most Balanced Performer Award.
- Received Employee of the Year Award.
- Received several Employee of the Month Awards.
- Received Sales Winner Awards
- An MVP Award Winner
- A Productivity Award Winner
- Received Community Top Personal Banker Award
- Received numerous letters of appreciation and recognition from numbers of highly satisfied customers
- Ranked among the top Telephone Bankers and Customer Service Representatives in the Nation
- Received Highest Quality Score Award as Telephone Banker.

Professional Experience

PERSONAL BANKER(SAFE)1 AND BUSINESS ADVOCATE Dec 2013

Company Name - City , State

Consistently a top performing Personal Banker and Business Advocate in the district. Received a Star Credit Award. Recognized for achieving the highest number of partner referrals which includes mortgages, merchant services, payroll services and insurance products. Frequent recipient of customers recognition for providing exceptional customer service experience.

Relationship Banker, Small Business Specialist, Investment Representative Nov 2009 to Aug 2013

Company Name - City , State

- Played a vital role in the customer banking experience.
- Built relationships with customers by providing them with products and services to meet their needs.
- Acquired, retained, deepened and managed relationships with customers.
- Generated growth in balances through sales, marketing, promotion and referral of products and services.
- Delivered outstanding customer experience and helped Branch meet sales objectives contributed to the success of the firm.
- Managed, maintained and developed assigned portfolio of customers.
- Profiled customers.
- Uncovered high potential and high balanced customers.
- Uncovered customer's financial needs and provided them product and service recommendations.
- Developed and cultivated existing customer relationships.
- Called existing and prospect customers.

- Partnered with specialists (such as Loan Officers, Business Bankers, and Financial Advisors), to ensure customers get access to experts who can help them with specialized financial needs.
- Responsible in opening Consumer and Business accounts, Loan applications, crossed-sells bank products and services, and resolved customer service issues.
- Participated in and occasionally facilitated daily branch team meetings.
- Assisted with coaching and training new bankers, tellers and other branch professionals.
- Participated in special projects, sales campaigns and assignments as requested.
- Identified and resolved complex client service opportunities.
- Received a National Achiever Banker Award, Employee of the Month Award, Consistently exceeded monthly sales goals, Received recognition as one of Top Bankers in Arizona Market, District, and Community.
- Recognized for consistently providing customers with the utmost customer experience and for deepening and sustaining customers banking relationship.
- Was licensed in Investment- Series 6, 63 and Insurance.
- Trained as a Small Business Specialist.
- Personal banker.

Jun 2009 to Oct 2009

Company Name - City , State

- Engaged in sales and service activities in a traditional branch setting.
- Opened consumer and Business accounts, Loan applications, crossed-sells bank products and services, and resolved customer service issues.
- Referred customers to other areas of U.S.
- Bank when appropriate.
- Converted service opportunities into sales events.
- Acquired, retained, deepened and managed relationships with customers.
- Responsible for generating growth in balances through the sale, marketing, promotion and referral of products and services.
- Provided banking sales solutions for deposit, loan and investment products.
- Acquired new clients and developed current book of business.
- Supported the branch in achieving sales goals.
- Provided sales and service assistance to customers.
- Developed and maintained broad knowledge of products and services to appropriately support client needs.
- Ensured compliance with operational, security and audit procedures and policies.
- Participated in special projects, sales campaigns and assignments as requested.
- Trained as a Business Banker and participated in extensive loan processing role.

Telephone Banker/ Customer Service Representative Oct 2007 to Jun 2009

Company Name - City , State

- Answered inbound calls pertaining to customers questions and concerns regarding their accounts.
- Serviced customers existing accounts.
- Recommended new products and services.
- Overcame customers banking concerns which include some escalated issues by recommending solutions and by providing utmost client experience.
- Achieved aggressive sales goals which were measured in daily basis.
- Maintained a well balanced performance in the field of Sales and Customer Satisfaction.
- Referred customers to specialists when necessary.
- Assisted supervisors and managers in retaining new and existing employees.
- Served as a mentor shadower to other telephone bankers and customer service representatives.
- Assisted supervisors in coaching other bankers and customer service representatives.
- Provided and shared best practices to fellow employees.

Education

Bachelor's Degree , Social Work St. Bridget's College - City , Philippines

Passed the Licensing exam in Social Work

Skills

- Leadership
- Marketing
- Motivation
- Multi-unit Operation Management
- Negotiation Skills
- New Business Development
- Operations Start-Up
- Organizational Restructure and Change
- Outsourcing
- Performance Analysis
- Problem Resolution Project Management
- Project Planning
- Public Relations
- Sales, Sales Analysis
- Service Quality Improvement,
- Staff Development
- Staff Motivation,
- Staff Training
- Change Implementation
- Communication Skills
- Community Outreach
- Cross-Cultural Communications
- Customer Relations
- Departmental Operations Management
- Diverse Market/Industry Knowledge
- Event Management and Promotion
- Expense Control
- Fast Learner
- Hard-worker
- Interpersonal Skills
- Staff-Retention Programs
- Start-Ups and Acquisitions
- Team Building
- Team Leadership
- Team Player