

Casey Hall
casey.z.hall@gmail.com
916-566-6124

PROFESSIONAL SUMMARY

Experienced financial analyst with excellent analytical skills as well as a devotion to customer service. Proposed changes to account opening procedures led to a 15% drop in wait time and processing errors. Looking to leverage banking skills at Merrill National.

WORK EXPERIENCE

BANKING ANALYST

RJ Savings and Trust

Dec 2016- Dec 2019

Managed 100 investors' due diligence processes and coordinated with international operations managers when required.

Performed financial risk assessments and studied banking and financial market trends to prepare activity and progress reports to management.

Navigated marketing activities by reaching out to 150+ VC and lead 5% prospects.

Key achievement

Conducted valuation report on \$20 million swaps deal for a tech company which resulted in 35% rise in corporate earnings.

ASSOCIATE BANKER

Merriweather Bank

Sept 2015-Dec 2016

Reviewed and processed credit and loan applications according to best practices and law.

Supported identifying potential sales opportunities to new business clients.

Handling daily reconciliation of payments as well as maintaining incoming and outgoing cash records.

Key Achievement

Earned Customer Service Award twice for excellence and professionalism in banking customer service.

EDUCATION

2011-2014, B.A. in Economics

University of South Dakota

President of the student finance club for 1 year.

SKILLS

Ability to work under pressure

Financial planning

Risk assessment

Customer service

Problem solving

Technical skills

Interpersonal skills

~~~~~

#### CERTIFICATIONS

Certified Financial Planner (CFP)

Certified Financial Analyst (CFA)