

# Jessica Claire Montgomery

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## Professional Summary

Successful banking professional with unsurpassed attention to detail and superior ethics. Focused on balancing customer needs with bank sales target goals. Dedicated to building and strengthening customer relationships.

## Work Experience

### Business Banking Administrator

*First National Bank Texas, Dallas, TX*

*July 2021 - Current*

- Prioritized planning with sound judgment and time management.
- Supported the commercial loan team with clerical tasks and loan processing duties.
- Assisted loan officers with application data acquisition and verification.
- Examined and verified information on loan application and closing documents.
- Prioritized and organized tasks efficiently to accomplish service goals.
- Juggled multiple projects and tasks to ensure high-quality and timely delivery.

### Senior Personal Banker

*CrossFirst Bankshares Inc, Dallas, TX*

*October 2019 - July 2021*

- Built strong rapport with new and existing clients to better serve their financial needs and promote branch loyalty.
- Partnered with loan and mortgage officers and financial advisors to provide clients with optimal financial solutions.

Helped customers open and close accounts, apply for loans, and make sound financial decisions.

Processed sales referrals and promoted bank services and products, resulting in a 40% branch sales increase.

## **Personal Banker**

*BancFirst Corporation, Mustang, OK*

*May 2012 - October 2019*

Helped customers open and close accounts, apply for loans, and make sound financial decisions.

Built strong rapport with new and existing clients to better serve their financial needs and promote branch loyalty.

Partnered with loan and mortgage officers and financial advisors to provide clients with optimal financial solutions.

Surpassed annual quota by 140% in sales and consistently met service team sales targets and call handling quotas.

## **Teller Supervisor**

*University of Miami Miller School of Medicine, Coral Gables, FL*

*May 2011 - May 2012*

Supplied tellers with coin and currency and maintained optimal financial controls. Verified transactions involving cashier's checks, money orders, and account transfers.

Managed and balanced cash vault audits and general ledger accounts.

Promoted facility security by monitoring customer behaviors and following established protocols to protect individuals and assets.

## **Office Assistant**

*Keysight Technologies, Washington, DC/VA*

*July 2008 - April 2011*

Updated financial, customer, and business records in company databases.

Organized files, developed spreadsheets, faxed reports, and scanned documents to bolster organizational workflow.

Collected payments, issued receipts, and updated accounts to reflect new balances.

Offered diverse clerical support to office team members, managed correspondence, answered telephone calls, tracked documentation, and maintained business records.

## **Customer Service Rep/Floor Support Supervisor**

*Emerson Hospital, Bedford, MA*

*August 2007 - January 2008*

Responded to customer contacts, received incoming calls, and handled problems, questions, and situations for customers.

Accurately entered customer information and trained staff to provide excellent customer service to challenging customers.

Monitored a team of 16 customer service representatives to assess knowledge, tone, and adherence to company policy.

## **Customer Service**

*Dick Blick Art Materials, [City, State]*

*March 2005 - February 2007*

Answered incoming calls and provided customer problem-solving.

Worked with drop ship vendors, processed vendor chargebacks, and filed damage/loss claims with freight carriers.

Answered customer questions about products and services and recommended appropriate solutions.

Reviewed customer complaints to determine appropriate methods of resolution.

## **Lead Teller/Personal Banker**

*Wells Fargo Bank NA, [City, State]*

*July 1997 - March 2005*

Supervised teller staff and trained new employees.

Maintained security control manuals and monitored incoming and outgoing cash vault.

Developed and maintained customer relationships, prepared loan documents, and set closings.

## Unit Secretary

*St. Mary Medical Center, [City, State]*

*April 1994 - July 1997*

Registered patients, answered incoming calls, ordered lab work and X-rays, and initiated and managed trauma alerts.

Entered patient charges for billing and scheduled outpatient procedures and admissions.

Conducted patient intake interviews to collect medical information and insurance details.