

# Karla M. Jordan

[jordan.km@gmail.com](mailto:jordan.km@gmail.com)

78 Ardmore Road  
West Hartford, CT 06119  
C: 347-585-7636

## EXPERIENCE

### **Citibank, Trade Finance, Product Specialist AVP**

**October 2010 – August 2011**

Collaborate with the Global Transaction Services trade sales team to generate multimillion sales revenues and trading volumes through the acquisition of domestic and international clients. Currently manage client acquisition for North America and LATAM markets by interacting with key executives (CEO, CFO, and COO) to present and discuss investment analyses and provide tailored advice in early production financing. Responsibilities include coordinating meetings with executives and preparing proposals and pricing analysis that outline the costs and benefits to the client. Coordinate client implementation with various production units to ensure account documentation is complete and client acquisition period is timely. Fully manage the internal audit review process, including periodic reviews and performance reviews for all client files to ensure company policy and procedure is followed.

### **Citibank, NYC Division Service & Operations Senior Assistant**

**March 2008 – October 2010**

Assisted the Division Manager of Operations, who managed 136 branches in the NYC area. Maintained constant communication with the entire management team, by receiving constant branch updates. Created an employee and area performance record, which included branch audit reviews, area management assessments, MIS reports, area level and division level quarterly losses, daily overdrafts, monthly audits for special business and consumer accounts, quarterly training, system enhancement training, and NYC division directory on a monthly and quarterly basis. Trained the management team to initiate innovative ways to communicate electronically and share crucial information by using systems such as SharePoint, Outlook and Access. Worked with the project management team to create and impose national projects aimed to enhance overall customer experience, with detailed outlines of time management for branch staff.

### **Citibank, Assistant Business Banker/ Service Officer**

**July 2007 – March 2008**

Delivered optimal customer service by serving as the first point of contact for customers entering the branch. Serviced all customer needs for business and consumer banking customers. Daily tasks included account fraud investigations, account closure requests, international wires, transfers and account maintenance requests such as fee adjustments, changes to signer information, account title changes, and account activity reviews. Partnered with the investment bankers and personal bankers to advise clients of financial products to fit their needs. Trained all new and existing tellers and was recognized for constantly exceeding individual quarterly sales goal.

### **Citibank, Full Time Teller,**

**August 2006 – June 2007**

Responsible to accurately perform customer transaction requests in accordance with bank policies and procedures. Customer transactions included but were not limited to deposits, withdrawals, and transfers for personal and business clients. Referred sales products to all clients and educated them on options to maximize their value. Recognized for delivering quality service to all clients and developing loyal customers, which resulted in impressive sales that exceeded the required quarterly goal.

## EDUCATION

**Masters in Finance** June 2010 Baruch College Zicklin School of Business: New York, NY GPA 3.7

**Bachelor of Arts in Economic Studies**, Minor in Italian, December 2006 Hunter College: New York, NY

## SKILLS

Fluent and proficient in three languages: English, Spanish & Italian. Computer skills include: Microsoft Office; Internet research, Outlook, Access, Database, and Intranet links. Intrapersonal Skills: Strong organizational skills, Team player, detail oriented and work independently.