



Emily Lin

A personal banker with five years of experience specializing in customer success, retail banking, cross-selling, and client relations. A proven track record of leveraging consultative sales techniques to identify optimal banking products for customers.

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Professional Experience

Personal Banker

Bank of America, Los Angeles, CA May 2018 - Present

- Manage relationships with 65+ banking customers, analyze client financial needs, identify appropriate financial solutions, and cross-selling banking products to achieve over 130% of monthly sales quota YOY
- ◆ Receive recognition with the Banker of the Year Award in 2021 for delivering a high-quality customer experience and achieving client satisfaction scores of 95%
- Develop a mentorship program to train new hires on client relations, cross-selling, and consultative selling, resulting in a 30% sales increase for the banking team

Personal Banker

Wells Fargo, Los Angeles, CA May 2016 - May 2018

- ◆ Led consultative meetings with existing customers and prospects to evaluate banking needs, identify sales opportunities, and provide education on financial solutions, including checking accounts, mortgage loans, savings accounts, and online banking
- Achieved 110%-120% of sales quota month over month and built relationships with customers to ensure alignment with financial needs and goals
- Identified resolution to customer issues regarding overdrafts, fraudulent charges, loan applications, fees, and overdue credit payments

Education

Bachelor of Science (B.S.) Finance
University of California, Los Angeles, CA
September 2012 ■ May 2016

Key Skills

- Personal Banking
- Cross-Selling
- Financial Services
- Customer Education
- Mortgage Loans