

RAYMOND ORTIZ

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EDUCATION & CREDENTIALS

Bachelor of Arts (BA) Accounting

University of Syracuse,
Syracuse, NY, 2010 - 2014

Series 7 License

KEY SKILLS

- ◆ Branch Operations Management
- Client Service & Satisfaction
- ◆ New System Implementation
- Process Redesign & Improvement
- * Product Promotions
- Staff Morale & Retention
- Team Leadership & Motivation
- Transaction Processing

Branch Manager with 8+ years of advancement and experience. Coordinate high-quality service to customers, drawing on broad expertise in various bank and loan products. Seasoned leader dedicated to raising employee morale, performance, and retention.

PROFESSIONAL EXPERIENCE

Branch Manager

ABC Credit Union, New York, NY | 2020 to Present

- Lead and motivate a team of 16 bank tellers carrying out various daily branch functions
- Renewed team's focus on service quality, helping drive a 12-point gain in customer satisfaction surveys
- Introduced a new customer intake process that raised first-year retention by 14 points and contributed to 11% growth in overall client base

Bank Teller

DEF Bank, New York, NY | 2014 to 2020

- Helped customers deposit, withdraw, and transfer money between accounts, and cross-sold additional bank products when appropriate