

# Garrett Frank

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## Objective

To work within an organization which promotes growth and exceptional service to clients.

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## Experience

02/14/06 - present

**Wells Fargo Bank**

San Francisco, CA

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### **VP Private Banker, AVP Business Relationship Manager, Central Business Relationship Manager, and Senior Business Specialist**

#### 🏢 **VP, Private Banker**

- o Manage a portfolio of 30 clients with \$5-100 million in Net Worth.
- o Provide clients with complex lending solutions for investment diversification, unsecured and secured lending, CRE investment, and specialty asset financing.
- o Provide Cash Management solutions for clients focusing on Foreign Exchange, deposit management, and Family Office management.
- o Actively manage existing loan portfolio for monitoring of covenants, margins, renewals and performance.
- o Act as liaison for clientele with Wells Fargo key internal partners such as Estate Planning, Insurance, Real Estate Management, SBA, Foreign Exchange, Treasury Management, and Specialty Financing.

#### 🏢 **AVP, Business Relationship Manager**

- o Manage a portfolio of 80 clients who generate \$5-50 million in annual sales revenue.
- o Consistently meet performance goals in credit and proxy, while managing loan renewals, covenants, and loan performance.
- o Act as liaison for clientele with Wells Fargo key internal partners such as SBA, Foreign Exchange, Treasury Management, Private Client Services, and Specialty Financing.

#### 🏢 **Central Business Relationship Manager**

- o Managed a portfolio of 250 clients who generate \$2-20 million in annual sales revenue
- o Won multiple sales performance campaigns

#### 🏢 **Senior Business Specialist**

- o Won a variety of sale promotions within my district for production and service.
- o Mentored newer Business Specialists to improve their approach with clients.

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## Education

09/20/05 – 03/13/09	<b>University of California at Santa Cruz:</b> Bachelor of Arts Degree, Psychology 3.2/4.0 GPA	Santa Cruz, CA
06/15/16 – Present	<b>Finra Licensed, CA Insurance:</b> Series 7, Series 66 & Health & Life	Fresno, CA
09/18/217 – 03/05/19	<b>California State University, Fresno:</b> MBA with distinction	Fresno, Ca

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## References

Available upon request