

RACHEL WEATHERS

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WEALTH MANAGEMENT SALES ASSOCIATE

- Successfully researched and identified 500+ wealth eligible clients through sales data analysis
 - Developed and implemented the core functions of the newly created position, the wealth sales coordinator – composed an illustration of those core job functions that is used by the Southern California Region
 - Supported employee training over a 3 year period for new recruits and offered continuous advice on duties and best practices
 - Continues to influence the scope of the role through best practices and by anticipating the needs of the wealth management team
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PROFESSIONAL EXPERIENCE

Wealth Management Sales Coordinator, 2018 – Present

Bank of the West, San Diego, California

Analyzes sales data to find potential new revenue sources for Advisors

Customized audit training materials specific to the needs of the markets covered, leading to passing scores for 4 annual federally regulated audits

Resolves client servicing needs quickly resulting in positive customer feedback

Provides sales support for entire Southern California Region

Personal Banker, 2015 – 2018

Wells Fargo, Lithonia, Georgia and San Diego, California

Developed relationships with new and existing customers resulting in client loyalty

Promoted and acquired new customers to participated in the financial literacy program

Advised on best products and services for customers to achieve financial goals

Research Analyst, Designer, 2014 - Present

911 S.A.L.T., Remote

Researches for workshops on leadership, community engagement, and diversity training

Designs marketing material for social media, website, and email distribution

Created a working manual for emotional intelligence and holistic wellness training for supervisors

Facilitator, 2013 - 2014

American University Dialogue Development Group, Washington, D.C.

Co-facilitated two 7-week programs on race, privilege, and ethnicity for 8-10 college student participants

Designed, planned, and evaluated each session including topics of focus and activities

SKILLS

- Microsoft Office Suite
- CRM (Microsoft Dynamics)
- Salesforce
- Customer Service
- Adaptability
- Creative problem solving
- Conflict analysis
- WordPress
- Creating and delivering workshop material
- Data protection

EDUCATION & LICENSES

M.A. International Peace & Conflict Resolution, American University

B.A. International Relations, Shaw University

Licenses: Series 7, Series 66