Account Analysis, Comprehensive, Customer Relationship Management, Effective Communication, Elm, EMMA, Ensuring Compliance, Financial Goals, Financial Planning, Forecasting, Leadership, personalized customer service, Private Banking, Proven Ability, Regulatory Compliance, Regulatory Standards, Risk Management, Strategic Planning

**Emma Wilson**

**Contact Information:**

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**Professional Summary:**

Highly accomplished Private Banking Executive with over 20 years of experience in the banking sector. Specializes in wealth management, investment strategy, and high-net-worth client advisory. Proven ability to develop and implement tailored financial solutions that drive client satisfaction and portfolio growth. Known for strategic insight, client-centric approach, and exceptional leadership skills.

**Education:**

**University of Manchester (Russell Group)**

* MBA in Finance, Distinction
* Graduated: 2002

**University of Cambridge (Russell Group)**

* BSc Economics, First Class Honours
* Graduated: 2000

**Professional Experience:**

**NatWest Private Banking**

**Director of Private Banking**  
*Manchester, UK*  
*2012 - Present*

Emma leads a team of private banking professionals, managing a diverse portfolio of high-net-worth clients and providing personalized financial solutions. She is responsible for developing investment strategies, conducting financial analysis, and ensuring compliance with regulatory standards. Emma is known for her ability to build strong client relationships and deliver exceptional service.

* **Key Responsibilities:**
  + Lead a team of private banking professionals.
  + Manage a diverse portfolio of high-net-worth clients.
  + Develop and implement investment strategies.
  + Conduct financial analysis and risk assessments.
  + Ensure compliance with regulatory standards.

**Key Achievements:**

* Increased client portfolio value by 40% through strategic investment decisions.
* Developed a comprehensive client advisory program that improved client engagement and retention.

**Santander Private Banking**

**Senior Private Banking Executive**  
*Manchester, UK*  
*2005 - 2012*

At Santander, Emma provided wealth management services to high-net-worth clients, including investment advice, financial planning, and risk management. She collaborated with internal teams to deliver comprehensive financial solutions and supported clients in achieving their financial goals.

* **Key Responsibilities:**
  + Provide wealth management services, including investment advice and financial planning.
  + Conduct risk assessments and develop risk mitigation strategies.
  + Collaborate with internal teams to deliver comprehensive financial solutions.
  + Maintain regular communication with clients to ensure satisfaction and address concerns.
  + Stay updated on market trends and regulatory changes to provide informed advice.

**Key Achievements:**

* Successfully managed a high-value client portfolio, increasing client assets by 35%.
* Implemented a client onboarding process that reduced setup time by 25%.

**HSBC Private Bank**

**Private Banking Executive**  
*Manchester, UK*  
*2000 - 2005*

Emma began her career at HSBC Private Bank, where she managed client relationships, provided financial advice, and developed customized financial plans. She worked closely with clients to understand their financial needs and goals, delivering tailored solutions to meet those needs.

* **Key Responsibilities:**
  + Manage client relationships and provide financial advice.
  + Develop customized financial plans based on client needs and goals.
  + Conduct financial analysis and risk assessments.
  + Collaborate with internal teams to deliver comprehensive financial solutions.
  + Maintain regular communication with clients to ensure satisfaction and address concerns.

**Key Achievements:**

* Increased client satisfaction scores by 30% through personalized service and effective communication.
* Developed a financial planning model that improved the accuracy of client financial forecasts.

**Skills:**

* Wealth Management
* Investment Strategy
* Client Advisory
* Financial Analysis
* Risk Assessment
* Regulatory Compliance
* Leadership
* Strategic Planning

**Certifications:**

* Chartered Financial Analyst (CFA)
* Certified Financial Planner (CFP)
* Advanced Certificate in Wealth Management