Account Analysis, Assets Under Management, Comprehensive, Customer Relationship Management, Demonstrated Ability, Effective Communication, Ensuring Compliance, Financial Planning, Forecasting, Investment Management, Maple, personalized customer service, Private Banking, Regulatory Compliance, Regulatory Standards, Risk Management, Risk Management Framework, Strategic Planning, Strategic Thinking, Team Leadership

**James Evans**

**Contact Information:**

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**Professional Summary:**

Experienced Private Banking Executive with over 20 years in the banking industry. Specializes in wealth management, portfolio management, and client advisory services. Demonstrated ability to build and maintain long-term client relationships and deliver customized financial solutions. Known for strong analytical skills, strategic thinking, and a client-centric approach.

**Education:**

**University of Manchester (Russell Group)**

* MSc Finance, Distinction
* Graduated: 2002

**University of Edinburgh (Russell Group)**

* BSc Business and Finance, First Class Honours
* Graduated: 2000

**Professional Experience:**

**Santander Private Banking**

**Lead Private Banking Executive**  
*Manchester, UK*  
*2012 - Present*

James leads a team of private banking professionals, managing high-net-worth client portfolios and providing tailored financial advice. He is responsible for developing and implementing investment strategies, conducting financial analysis, and ensuring compliance with regulatory standards.

* **Key Responsibilities:**
  + Lead a team of private banking professionals.
  + Manage high-net-worth client portfolios and provide tailored financial advice.
  + Develop and implement investment strategies based on client needs and market conditions.
  + Conduct financial analysis and risk assessments.
  + Ensure compliance with regulatory standards and internal policies.

**Key Achievements:**

* Grew client portfolio value by 30% through strategic investment management.
* Developed a client advisory program that enhanced client engagement and satisfaction.

**HSBC Bank**

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

At HSBC, James managed a portfolio of high-net-worth clients, providing wealth management services and investment advice. He conducted detailed financial analysis, developed risk management strategies, and collaborated with internal teams to deliver comprehensive financial solutions.

* **Key Responsibilities:**
  + Manage a portfolio of high-net-worth clients and provide wealth management services.
  + Conduct financial analysis and develop risk management 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 increased client assets under management by 25%.
* Implemented a risk management framework that improved portfolio performance.

**NatWest Group**

**Senior Relationship Manager**  
*Manchester, UK*  
*2000 - 2005*

James began his career at NatWest Group, where he managed client relationships, provided financial advice, and developed customized financial plans. He 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 20% through personalized service and effective communication.
* Developed a financial planning model that improved the accuracy of client financial forecasts.

**Skills:**

* Wealth Management
* Portfolio Management
* Client Advisory Services
* Financial Analysis
* Risk Management
* Regulatory Compliance
* Strategic Planning
* Team Leadership

**Certifications:**

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