

STANLEY WONG

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San Francisco, California



EXPERIENCE

Relationship Banker

City National Bank

06/2017 - Ongoing Burlingame, CA

Company Description

- Primary role is Business Development Officer; research on various prospects across different industries throughout Bay Area. Sales pitch preparation includes list of competitors, 1st td research, anticipated market trends, and similar case studies.
- Develop a keen eye to detect fraudulent activity within various depository accounts and have strong knowledge of KYC background.
- Create and nurture relationships with center of influence contacts with mortgage brokers, CPAs, financial advisors, attorneys, and business owners who can bring value to one another.
- Received recognition for Top Banker for 2018 Q1.

Client Service Coordinator

Ameriprise Financial

06/2015 - 06/2017 San Francisco, CA

Company Description

- Served as the primary liaison between internal departments, wholesalers, strategic partners, and the 300+ clients under our Ameriprise Financial Franchise office.
- Maintained an in-depth understanding of financial service lingo, complete financial planning process, and current market trends.
- Assisted in portfolio rebalancing with advisor's guidance based on clients' investment objectives.
- Coordinated all account transfers and consolidations including retirement accounts and various insurance policies.

Personal Banker I

Wells Fargo

11/2014 - 07/2015 San Bruno, CA

Company Description

- Analyzed customers' financial situation to offer a tailored service with a fiduciary responsibility in mind to help strengthen client's financial stability.
- Educated the importance of financial freedom by opening consumer accounts, retirement accounts, credit lines and cards, and credit score discussions.
- Built long lasting relationships with clients where it resulted in a network of referrals and introductions.

SUMMARY

I am a motivated, high-energy professional with a passion for efficient solutions and innovative changes. I have the natural ability to wear multiple hats for all types of projects.

LANGUAGES

English

Expert



Cantonese

Intermediate



Spanish

Intermediate



Mandarin

Intermediate



EDUCATION

Masters of Science in Finance

Golden Gate University

01/2012 - 11/2012 San Francisco, CA

Bachelor's of Science in Business

Golden Gate University

05/2010 - 08/2011 San Francisco, CA