

JOSEPH VILLAFLOR-MEDINA

Email: josephevm415@gmail.com **Call:** +1 415 410 3790 **LinkedIn:** <https://www.linkedin.com/in/jvm415>

CAREER HISTORY

Wells Fargo – Personal Banker; Piedmont, CA

| March 2024 – December 2024 |

- Ranked #1 in branch credit product sales, consistently opening 10+ new credit card accounts per month through consultative, client-focused selling
- Managed a portfolio of 50+ business and high-net-worth clients by delivering personalized financial solutions and addressing client needs, driving higher retention and account growth
- Conducted discovery conversations to identify upsell and cross-selling opportunities, contributing to a 15% increase in product adoption in Q2 2024
- Leveraged Salesforce CRM to track client interactions, manage outreach campaigns, log pipeline activities, and maintain consistent communication cadences
- Partnered cross-functionally with Legal, Risk, and Compliance teams to ensure compliant and efficient client onboarding and account servicing

Wells Fargo – Teller; Piedmont, CA

| December 2023 – March 2024 |

- Processed 100+ transactions daily with 98% accuracy, balancing operational excellence with client experience
- Identified client needs and referred to appropriate financial specialists, increasing qualified leads by 20% in Q1 2024
- Resolved customer concerns on the spot, directly enhancing client retention and satisfaction

City and County of San Francisco – Legislative Intern; San Francisco, CA

| April 2019 – August 2019 |

- Analyzed transportation policy and Bay Wheels (Lyft) bikeshare usage data to support city approval of 9 out of 15 proposed station locations, contributing to data-driven urban mobility planning
- Created demographic dashboards using Excel pivot tables to support city planning and equity analysis
- Drafted public policy summaries featured in the *San Francisco Chronicle*, ensuring transparency and public awareness of local legislation
- Engaged with constituents via phone, email, and in-person outreach to strengthen public trust and communication

EDUCATION

University of California, Los Angeles - Bachelor of Arts in Philosophy; Los Angeles, CA

| June 2022 |

SKILLS

Salesforce CRM • Lead Qualification • Outbound Prospecting • Cold Calling & Emailing • Client Relationship Management • Excel (Pivot Tables) • Presentation • Notary Public