

ROBIN DOE

SENIOR RELATIONSHIP BANKER

Charlottesville, VA | 555-555-5555 | Robin.Doe@gmail.com | LinkedIn.com/in/robin-doe

Manager | Sales | CRM | Leader | Consultant

Highly driven, resourceful business development professional with 20+ years' experience in driving new business and client management. Effectively establishes strategic partnerships to increase channel revenue. Handles and executes complex projects with high-level accuracy. Sincere, ethical problem-solver with strong entrepreneurial and networking skills.

- ◆ Proven ability to develop and manage new business accounts in a multi-channel environment while managing risks.
- ◆ Develops strategic action plans and increases sales/team performance through effective relationship management.
- ◆ Adept at developing in-depth views of the external marketplace including competition, consumer trends, and third-party opportunities while working collaboratively with culturally diverse clients and internal teams.

CORE COMPETENCIES

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|-----------------------------------|--------------------------------|---------------------------------|
| -- Business Development | -- Sales & Marketing | -- Process Improvements |
| -- Client Relationship Management | -- Product/Services Management | -- Strategic Market Positioning |
| -- Customer Acquisition/Retention | -- Competitive Positioning | -- Brand Promotion/Management |
| -- Media Planning/Management | -- Partnerships/Collaboration | -- Customer Service/Leadership |

PROFESSIONAL EXPERIENCE

TRUIST BANK | Any City, VA

Jun 2018– Present

Formerly Suntrust Bank

Senior Bilingual Relationship Banker

Oversee and manage client service experience and grow client relationships while providing financial solutions via consultative client interactions. Assist bank in achieving financial goals and expanding business opportunities through collaborating/outsourcing referrals to Truist business and product partners. Provide backup assistance with walk-in banking customers with financial transactions.

- ◆ Optimize business development for companies with up to \$100,000 in annual gross sales, focused on cross-sales to mortgage team, business partners, cash management, and investment consultants.
- ◆ Consistent top performer with 150%+ average monthly scorecard and year-end reviews.
- ◆ Month-to-date personal branch contribution benchmark as of July 2021 was 171% (exceeding 32% target at 54.80%).
- ◆ Educate individual/business clientele on new product offerings and business promotions while providing cross-referrals for mortgage, insurance, and financial solutions (e.g., merchant, treasury management, and depository services).
- ◆ Recognized as 4th Quarter Truist Bank State of Virginia Top Performer for 2021, driving growth and new business.
- ◆ Recognized for top area credit card sales with 28 credit cards approved/activated in one month.
- ◆ Achieved consistent average at 140%+ in every quarter review.
- ◆ Recognized for reliability with zero sick days used in 3 years (perfect attendance).
- ◆ Received top recognition for Retail Banking Leader Program and multiple letters of recognition from customers.
- ◆ Received consistently high ratings on Voice of Client surveys and consistently high rankings in annual performance reviews.
- ◆ Manage new outbound/inbound leads via phone and e-mail. Actively engage prospects through networking with business owners and working closely with internal departments, resulting in consistently exceeding set goals.
- ◆ Implement CRM to manage sales activity and facilitate revenue growth by identifying client needs and providing needs-based solutions and services including loans, deposits, and all other applicable banking services.
- ◆ Own accountability for risk by openly exchanging ideas and opinions, elevating concerns, and personally following through on defined policies/procedures and regulatory compliance.

PROFESSIONAL EXPERIENCE

SPRINT | Any City, VA

Jan 2017 – Jun 2018

Retail Sales Consultant

Served as subject matter and customer experience expert delivering complete brand package products, plans, and services while meeting customer satisfaction and individual/company growth objectives. Communicated effectively with prospects and existing clientele to determine wireless/mobility needs required to accurately offer total product and services solutions.

- ◆ Executed 75+ cold calls daily, promoted online presence through listing ads, greeted customers, answered inquiries, managed customer service issues, offered recommendations, deterred theft, and organized store supplies.
- ◆ Recognized as top sales consultant through successful presentation, promotions, and sales of products/services utilizing persuasive and consultative selling techniques with prospective small business customers.
- ◆ Demonstrated superior initiative in revenue generation through aggressive outbound cold calling during last 3 hours daily, resulting in meeting/exceeding key performance targets for sales and customer satisfaction.
- ◆ Responded to potential new customers by answering all inbound calls or initiating calls to potential customers responding to advertisements and through targeted promotions as well as other marketing channels.

ADDITIONAL EXPERIENCE

Contract Killer Prepaid Wireless, Owner Operator, Charlottesville, VA

Oct 2010 – Oct 2018

Managed business financial budget and oversaw sales and repair operations.

Renovision Systems Private Limited, Owner Operator, Charlottesville, VA

Feb 2003 – Sep 2010

Oversaw operations and negotiated product/services sales

Chiang House Restaurant, Family Owned, Charlottesville, VA

Jul 1990 – Mar 2003

Managed operations and \$99K/month gross sales

EDUCATION

Harvard Extension School, Management Graduate Program (ongoing)
 Nova Northern Virginia Community College, Fairfax, VA, Business Major
 Piedmont Virginia Community College, Charlottesville, VA, Business Major

CERTIFICATIONS

Securities Industry Essentials (SIE) FINRA Certification (Underway)
 American Bankers Association, Certificate in Business & Commercial Lending
 Real Estate Mastery System Workshop
 Discount Mortgage Workshop (low-risk, high-yield returns of 15%-25 secured by real estate)
 Certified Trainer for Wix Website Development
 ServSafe Manager Certification / ServSafe Food Handler Certification (Food Safety)
 OSHA Safety Certification for Collision Repair Facilities

LANGUAGES

Chinese (Native Speaker)
 Mandarin (Native Speaker)
 English (Fluent)

LYNN DOE

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PERSONAL BANKING SERVICE | FINANCIAL ANALYSIS | CUSTOMER SERVICE

Knowledgeable, resourceful finance and customer/client services professional with experience managing projects and processes to support business development initiatives in the financial sector. Provides top-notch collaboration and assistance to upper management, clients, customer, and third-party partners. Manages multiple schedules and maintains communication across teams. Organized and trustworthy with confidential and personal information. Skilled in coordinating and improving key business processes. Exceptional work ethic with a committed focus on quality and excellence. Collaborates strategically and cross-functionally to manage and complete projects to the highest standard.

CORE COMPETENCIES

- ◆ Business Development Coordination
- ◆ Client / Customer Account Management
- ◆ Regulatory Compliance / Documentation
- ◆ Project Management / Strategic Planning
- ◆ Credit Risk Evaluation & Analysis
- ◆ Customer Relationship Management
- ◆ Financial Risk Management & Monitoring
- ◆ Financial Statement Presentations
- ◆ Leadership, Team Building, Coaching

PROFESSIONAL EXPERIENCE

WELLS FARGO BANK | Albuquerque, New Mexico

Jun 2011 – Feb 2023

Personal Banker II (2014 – 2023)

- ◆ Oversaw daily operations as Branch Manager to team of 12 and assisted customers with bank account/financial management, including planning/funding retirement income using annuities, mutual funds, and other options to manage, customize, and diversify portfolios.
- ◆ Closed ~\$75,000/month in loans through examining customer loan applications for approval requirements to mitigate loan denials, per Bank Secrecy Act, Anti Money Laundering, OFAC, USA Patriot Act, Privacy Act, and Community Reinvestment Act regulations.
- ◆ Nominated for Community Bank Banker Ambassador Program allowing participation in confidential initiatives and providing feedback to executive teams; collaborated with colleagues to present Teach Children to Save lessons at S.Y Jackson Elementary School.
- ◆ Completed Wells Fargo's 8-week licensing program for Series 6, 63, and 65 licenses along with NM Life Insurance Series 18-25 license.

Lead Teller (2011 – 2014)

- ◆ Managed team of 10 and increased branch production and revenue and achieved 90%+ of monthly/quarterly customer experience goals.
- ◆ Provided focused service and referred customers to bank representatives for cross-sell opportunities; managed teller schedule to effectively staff weekly and weekend shifts; mentored team members while leveraging performance management tools and processes.
- ◆ Nominated for Community Bank Teller Ambassador Program to develop critical thinking skills and gain in-depth risk management knowledge; recognized as 10-time Circle of Stars Award recipient for Leadership Excellence.

WAFD BANK | Albuquerque, New Mexico

Feb 2009 – Feb 2011

Commercial Real Estate Credit Analyst

- ◆ Analyzed income-producing financial information for property, borrower, guarantor, and loan structures for new and renewal commercial real estate credit and loan requests; developed/implemented performance improvement strategies to promote continuous improvement.
- ◆ Managed treasury services underwriting segment for commercial clients, produced financial forecasting models, analyzed market trends, and generated cash flow analyses, including executing debt service calculations.
- ◆ Increased revenue through performing monthly credit reviews/financial assessments on corporations, determining/initiating client limit increases and presenting credit submissions to upper management and executive teams for approval.
- ◆ Served as AREA (Albuquerque Regional Economic Alliance) Ambassador / Finance and Community Outreach Committees for CREW NM.
- ◆ Completed American Bankers Association Commercial Lending and Analyzing Financial Statements courses.

EDUCATION

University of North Dakota, Grand Forks, ND

Master of Business Administration (MBA) (2018)

University of New Mexico, Albuquerque, NM

Bachelor of Science in Sociology (2009)