

NAME

XXXXXXXXXXXXXXXXXX, Rochester, New York 14621 XXX.XXX.XXXX XXXXXXXXXXXX@gmail.com

QUALIFICATIONS PROFILE

Goal-driven and motivated professional, seeking admission to the Executive MBA Weekend Program at [Name of School] in order to improve leadership and business management capabilities along with client relationship skills. Adept at working within fast-paced and diverse environments, while establishing rapport with professionals from all levels and backgrounds. Expert at leading overall operations and providing support to the management toward organizational growth and advancement. Articulate communicator; bilingual in English and Spanish.

EDUCATION

Bachelor of Science in International Business: 2013 | XXXXXXXXXXXXXXXXXXXX, ROCHESTER, NY

PROFESSIONAL EXPERIENCE

XXXXXXXXXXXXXXXXXX, NEW YORK, NY

Private Client Banker 2019–Present

Secure and maintain current client base, while generating annual income of \$350K and more than \$2M in investments. Perform networking to onboard new clients and drive growth within book of business by \$2M on a monthly basis. Exemplify analytical skills in evaluating customer's financial profile to offer recommendation on credit and investment solutions. Maintain active involvement on private client presentations, comprised of 5,000,000 networks of clients.

Notable Accomplishments:

- ✓ Served as an integral member of the branch's managing team, in charge of handling \$158M book.
- ✓ Earned recognition as National Achiever through excellent performance and professionalism.

Relationship Manager 2015–2019

Established and cultivated center-of-influence network to provide large lists of clients. Developed and implemented business presentation to onboard new clients and build business, as well as generate annual sales worth more than \$3M. Completed extensive credit training, which enabled the identification of customer capital needs. Employed analytical skills in evaluating business statements to improve payroll and business expenses.

Notable Accomplishments:

- ✓ Led efforts to consistently achieve quarterly goals by generating additional balances to the company's books.
- ✓ Successfully closed an average of \$1.3M credit products on a monthly basis.

XXXXXXXXXXXXXXXXXX, Miami, FL

Account Executive 2014

Keenly evaluated monthly sales reports in collaboration with sales and marketing executives. Prepared and executed product presentations for campaign promotions.

Notable Accomplishments:

- ✓ Initiated package programs to promote products and services to new customers, ensuring sales increase.
- ✓ Contributed key efforts in establishing the business from the ground up and launch to the public.

INTERNSHIP

XXXXXXXXXXXXXXXXXX, ROCHESTER, NY

Intern 2013–2014

Rendered effectual assistance with the maintenance of accounts, records, and beneficiary information.

PROFESSIONAL DEVELOPMENT

Credit and Banking Training: XXXXXXXXXXXXXXXXXXXX

CREDENTIALS

FINANCIAL INDUSTRY REGULATORY AUTHORITY

Series 6: Investment Company and Variable Contracts Products Representative Examination

Series 63: Uniform Securities Agent State Law Examination

Life Insurance Licenses

ACTIVITIES

Mentor–XXXXXXXXXXXXXXXXXX, Rochester, NY | *Volunteer*–XXXXXXXXXXXXXXXXXX, New York, NY

TECHNICAL ACUMEN

Microsoft Office Suite (Word, Excel, PowerPoint) | Microsoft Access | QuickBooks | Mac | IBM CRI