

SAM SMITH

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FINANCIAL SERVICES MANAGER

Account & Relationship Management/New Business & Lead Development/Staff Supervision & Training

PROFESSIONAL PROFILE

An innovative and results-driven Financial Services Professional with a 16-year career demonstrating visionary leadership, outstanding performance, and progressive experience with leading banking institutions. Recognized as a top producer increasing revenues and profits through expertise in business development, relationship management, and unparalleled service delivery. Articulate communicator, presenter, and facilitator adept in creating unique approaches and programs that drive business growth, deliver measurable results, and achieve customer satisfaction. A catalyst for positive change with a proven ability to develop constructive relationships and teams with a broad and diverse group of cross-functional business partners, influence key internal/external stakeholders, and build consensus around decision-making and problem-solving. Superior interpersonal, organizational, critical-thinking, and analytical skills. Exceptional written, oral, and technical aptitude. Microsoft Office proficient.

CORE COMPETENCIES

- *Sales Management/Training*
- *Client Acquisition/Retention*
- *Strategic Market Positioning*
- *Revenue Growth/Enhancement*
- *HR Practice/Management*
- *Financial/Credit/Tax Analysis*
- *Profit & Market Share Growth*
- *New Business Development*
- *Territory Growth/Management*
- *Regulatory Compliance*
- *Networking/Prospecting*
- *Data Administration/Reporting*
- *Employee Relations/Satisfaction*
- *Team Performance Optimization*
- *Performance Monitoring/Analysis*
- *Financial/Investment Planning*
- *Budget Planning/P&L Management*
- *High-Impact Sales Presentations*

PROFESSIONAL EXPERIENCE

ABC Company Any Town, USA Jul. 2008 - Present
Branch Manager/Assistant Vice President

- Provided overall leadership for the branch including oversight of all sales/service activities, marketing, operating budget, profitability, and operational integrity; focused primarily on commercial lending with a specialty in small to medium size businesses.
- Maintained overall responsibility for profit and loss, cash controls, general operations, and audit preparation.
- Provided direct management for the branch's sales activities across five (5) categories: consumer loan production and growth, commercial loan production and growth, deposit production and growth, household growth, and investment revenue and growth; managed cash flow and uncovered lending options to help clients succeed.
- Spearheaded all business development efforts; increased number of business households and grew all commercial lending activities.
- Cultivated and managed new and existing relationships of high net-worth clients and their related businesses.
- Developed a close working relationship and sales plan for a diverse client base; provided a broad range of services including investment management, estate planning, and credit and personal banking products.
- Collaborated with brokers to cultivate a network of referrals; generated additional client appointments through direct telemarketing.
- Coordinated events/seminars and established joint marketing campaigns designed to generate referrals; helped foster cooperation between internal business units.
- Maintained up-to-date knowledge of industry and governmental policies and regulations.

Selected Accomplishments:

- Revitalized a failing branch, facing certain closure, to the most profitable and successful location within the region; recognized as the flagship bank for both sales and promotions of employees into management positions.
- Achieved Million Dollar Plus Club honors for consumer and commercial production, 2008, 2009, and 2010.
- Produced three (3) prominent business lending deals recognized in the Any Town Business and Wall Street Journals, 2008 - 2010.
- Rebuilt the location from 3500 to 8500 commercial transactions per month.
- Grew loan portfolio by \$5M in under two (2) years; significantly increased deposit growth to \$55M.
- Consistently improved deposit and loan growth, increased sales, and expanded consumer loyalty and trust.
- Successfully courted and obtained the business of a top CEO for a major sports retail outlet; translated into additional business from executives as a whole across the board for wealth management division.

PROFESSIONAL EXPERIENCE (CONTINUED)

ABC Company **Any Town, USA** **Aug. 2005 - Jul. 2008**
Regional Private Banker

- Managed and retained full-service banking relationships of affluent customers within a complex multi-million dollar portfolio of accounts.
- Developed a customer base through cross-selling products and services to existing clients; gained new business through community involvement and prospecting owner's and executives within the community.
- Continuously expanded referral network through contact with various internal business partners and external financial intermediaries.
- Consulted with customers regarding financial needs; opened and serviced accounts, recommended products and services including credit structures, conducted financial planning sessions, and ensured proper maintenance of sensitive records/files within policy guidelines.
- Analyzed financial, tax, and credit needs of customers; monitored the customers changing requirements and recommended strategies that utilized company products/services.

Selected Accomplishments:

- Earned South Metro Market Recognition for Outstanding Accomplishments, Quarters 1 - 4, 2006.

ABC Company **Any Town, USA** **Sept. 2003 - Jul. 2005**
Personal Banker

- Sold investment accounts, loans, lines of credit, checking, and savings accounts.
- Trained tellers and customer service associates on how to better identify potential sales opportunities and enhance existing customer relationships.

Selected Accomplishments:

- Ranked as a Top 25 Producer for the state (out of approximately 200 bankers), 2004 and 2005.

ABC Company **Any Town, USA** **Sept. 2000 - Sept. 2003**
Sales Supervisor - Digital/Computer Systems & Technologies/Wireless Communications Departments

- Sold computers, digital cameras/camcorders, and general electronic equipment.
- Recruited, trained, and supervised a team of up to eighteen (18) sales associates; built effective teams through talent assessment, recruiting, team development, training, recognition, accountability, and merchandising.
- Conducted inventory counts, ensured appropriate stock levels, store appearance standards, and product functionality.
- Provided unparalleled customer service.

Selected Accomplishments:

- Winner, ABC Company Best of the Best, 2000, 2001, and 2002.
- Achieved Commitment to Sales Proficiency, 2003.
- Recipient, ABC Company Top Gun Supervisory Award, 2002.
- Earned five (5) performance-based promotions during tenure; selected to run larger departments, improve performance, and hire my replacement.

Additional Experience:

Commercial Loan Officer - Western Financial/Assistant Manager - Senior Account Representative - ABC Company

EDUCATION

Bachelor of Science in Finance - University of Phoenix, Colorado Campus

DESIGNATIONS

▪ NASD (FINRA) Series 7 and 66 ▪ Colorado Life and Health Insurance ▪ Licensed Notary Public

PROFESSIONAL DEVELOPMENT

- Business Development Training - ABC and Associates
- Management and Accounting Training - ABC Company
- Personal and Business Tax Return Analysis ▪ Ultimate Business Banker Training

PROFESSIONAL AFFILIATIONS

- Any Town Chamber of Commerce, 2008 - Present
- Any Town Chamber of Commerce, 2010 - Present
- Any Town Defense Council, 2010 - Present