

JANE SMITH, M.S.

123 Any Street • Any Town, USA 12345

Mobile Telephone: 123.456.7890 • Home Telephone: 123.456.7890 • Email: janesmith@hotmail.com

FINANCIAL SERVICES PROFESSIONAL WITH 13 YEARS OF INDUSTRY EXPERIENCE

Account & Relationship Management/Strategic Planning & Collaboration/Project & Team Leadership

PROFESSIONAL PROFILE

An innovative and results-driven Financial Services Professional with a 13-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 research and development, relationship management, and unparalleled service delivery. Articulate communicator and project manager adept in creating unique approaches and programs that drive business growth, deliver measurable results, and achieve customer satisfaction on time and under budget. 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. Authorized to work in the United States.

CORE COMPETENCIES

- *Relationship/Alliance-Building*
- *Client Acquisition/Retention*
- *Strategic Market Positioning*
- *Revenue Growth/Enhancement*
- *Quality Assurance Standards*
- *New Business Development*
- *Project/Planning Management*
- *Networking & Prospecting*
- *Data & Records Administration*
- *Budget Planning/Cost Controls*
- *Statistical Research & Analysis*
- *Team Performance/Optimization*
- *Personnel Management/Training*
- *Progress/Performance Reporting*
- *Group Collaboration/Facilitation*

EDUCATION

Masters of Science in International Marketing - London South Bank University, London, United Kingdom

Professional Diploma in Marketing - Chartered Institute of Marketing, Berkshire, United Kingdom

PROFESSIONAL EXPERIENCE

ABC Company Any Town, USA **Sept. 2008 - Aug. 2010**

Business Research Associate

Key contributing member of the Insight Team within the Investment Banking Division; spearheaded business-to-business (B2B) research of large global corporate and financial institutions within Global Banking & Markets and Global Transaction Services across Europe, Asia, and North America.

- Managed and coordinated syndicated research programs including Greenwich Associates, Peter Lee & Associates, and Brendan Wood International to name a few.
- Identified gaps within syndicated program content and commissioned bespoke research projects to fill said gaps; provided recommendations to executive sponsors to address business objectives.
- Established and maintained relationships with external suppliers and key businesses; liaised laterally and vertically to ensure understanding of ABC business and to secure appropriate support and analysis in the generation of investment money.
- Collaborated closely with key business stakeholders; identified research opportunities to impact long-term strategic business needs.
- Distilled data into actionable ideas and meaningful reports through data analysis, management, and reporting; presented findings to senior business heads and their Management Teams.

Selected Accomplishments:

- Recognized for recommending and applying appropriate specialist analytical techniques (key driver analysis) to extract the most useful results in-line with business needs.

ABC Company Any Town, USA **Jun. 2005 - Apr. 2008**

Research Project Supervisor

Directed research projects and supervised the call center for a leading-edge research consulting firm; provided insight into consumer behavior and purchasing patterns which led to better investments and business decisions.

- Managed budget and cost control initiatives; estimated costs, determined staffing requirements, procured materials, and prepared detailed financial reports.

PROFESSIONAL EXPERIENCE (CONTINUED)

- Spearheaded field research projects annually for retail giants including IKEA, M&S, ASDA, and ILVA; partnered with senior management on project development and delivery, managed timeline, recruited for and conducted focus groups, performed observations, and assisted shops.
- Trained and supervised a remote staff of fifteen (15) Consumer Researchers geographically dispersed throughout Ireland and the UK; developed and coordinated schedules, briefed team on project details, and built an effective team through team development, training, recognition, and accountability.
- Directed research design and field-based quality control; evaluated and updated research questionnaires, maintained quality control standards, and implemented new techniques to ensure consumer understanding.
- Supervised a call center staff of fifteen (15); provided leadership by creating a collaborative, innovative, and results-orientated environment and monitored adherence to company policies to maximize profitability.

Selected Accomplishments:

- Effectively combined and analyzed data findings from a variety of sources and provided clients with concise and actionable solutions in accordance with business needs.

ABC Company

Any Town, USA

Mar. 1996 - Apr. 2004

Personal Banking Officer/Relationship Manager (PBO/RM)

Primary Relationship Manager for the administration and portfolio management of over 300 Personal Banking and Professional Club clients with assets valued over \$250K.

- Trained tellers and customer service associates on how to better identify potential sales opportunities and enhance existing customer relationships.
- Developed a close working relationship and sales plan for a diverse customer base; provided a broad range of services including portfolio management, investment management, and credit and personal banking products.
- Performed effective life cycle planning and developed marketing strategies for targeted clients; identified new business opportunities and grew customer base through cross-selling products and services to existing clients.
- Processed and approved all mortgage loan, credit card, and credit line applications for Personal and Professional customers; compiled and verified application information, reviewed agreements for accuracy and compliance, and monitored time-critical turnaround requirements.
- Oversaw and maintained target database using Microsoft Access; prepared Balance Scorecard and analyzed and reported on progress of target segment to Regional Manager monthly.
- Deputized positions for Senior Treasury and Accounts Managers; managed two (2) - eight (8) direct reports.

Selected Accomplishments:

- Promoted four (4) times during company tenure from Accounts/Ledger Clerk to Teller, Teller to Senior Treasury Clerk, Senior Treasury Clerk to Private Banking Officer, and Private Banking Officer to PBO/RM.
- Developed and managed excellent working relationship with all clients; built a solid reputation for exceptional service which generated repeat business.
- Successfully migrated targeted portfolio through the bank's Strategic Segmentation Program to upper-tiered Private Banking status.

Additional Work Experience:

Any Town, USA: Export Cargo Agent, ABC Company (Mar. 2011 - Present)

Any Place, USA: Fundraiser, ABC Company (May 2005 - Jun. 2005)/Distributor, ABC Ltd. (Jan. 2005 - Apr. 2005)/

Receptionist, ABC Banking Ltd. (Dec. 2004 - Jan. 2005)/Customer Service Officer, ACC (Sept. 2004 - Dec. 2004)

PROFESSIONAL DEVELOPMENT

▪ **Certificate in Business and Computer Technology**

The Royal Bank Institute of Business and Computer Technology, Port of Spain, Trinidad, and Tobago

▪ **Certificate of Achievement**

Dale Carnegie & Associates, San Fernando, Trinidad and Tobago

TECHNICAL ADDENDUM

- Microsoft Word, Access, Excel, Outlook, and PowerPoint ▪ SPSS (Statistical Computer Program)

PROFESSIONAL AFFILIATIONS/COMMUNITY INVOLVEMENT

- Member, Alumni of ABC South Bank ▪ Team Leader, Any Town Cares