

OPERATIONS MANAGER

Summary

My goal is to utilize my 20 years of banking experience and education in business management and human resources in order to expand on my management experience. Skilled in financial reporting, account balancing and reconciliation, project management, and analytics.

Highlights

- Quantitative analysis & metrics
- Account reconciliation & balancing
- Complex problem solving
- Staff leadership and development
- Expert in MS Office Suite
- Conflict resolution
- Strong interpersonal skills
- Procedure development

Experience

Operations Manager

October 2011 to Current Company Name - City , State

- Manage the daily functions of Real Estate and Oil, Gas, and Mineral AP(accounts payable) and AR(accounts receivable) transactions
- Manage a team of 15 staff members who perform duties across multiple lines of business
- Conduct employee performance reviews and individual development plans for success
- Daily and monthly account reconciliation of internal house suspense accounts
- Accurately document and report items out of SLA to senior management with correspondence to field partners
- Provide training to team members on job responsibilities and cross-train opportunities
- Research and resolve complex variances
- Review daily work for quality control and errors
- Conduct year-end tax 1099 and 1098 statements for Real Estate Assets and Loans

Personal Banker/ Business Champion

July 2007 to October 2011 Company Name - City , State

- Profile and analyze clients financial situation in order to provide a proper recommendation of bank products and services
- Coach teller line to send over referrals to bankers to achieve sales goals
- Interact with clients and bank personnel on a daily basis in order to reach branch, team and individual goals
- Originate applications for personal, mortgage, and business loans to meet customer needs
- Exceed sales goals by maintaining a strong book of business
- Provide hands on system training for new bankers
- Oversee daily operations of branch compliance regulations

Wealth Management Group Relationship Associate III

June 2004 to May 2007 Company Name - City , State

- Provide administrative support to Private Bankers, Financial Consultants, Trust Advisor's and Investment Bankers to ensure all client needs are met with the highest quality of service
- Assist Private Banker in the management of their book of business which held over 180 clients
- Account reconciliation of Private Banking general ledger accounts
- Submit large commercial and consumer loan applications, schedule appraisal appointments, order loan documentation, assist clients with the closing of loan requests, and ensuring that all documents are properly recorded
- Receive incoming client contacts and handle client request and inquiries in a timely and efficient manner
- Identify client needs and revenue enhancement and cross-sell opportunities
- Prepare Personal Financial Statements for clients annually and request updated tax returns to maintain client files
- Maintain accurate record of incoming personal client information via excel spreadsheets

Deposit Risk Operations Fraud Manager

June 2001 to June 2004 Company Name - City , State

- Perform complex research and quick shot analysis on suspected fraud accounts
- Managed a team of 12 fraud analysts in the daily process and review of suspicious account activity and new account fraud
- Provide job training, facilitated team meetings, and participate in associate development and reviews
- Avert over one million dollars in potential loss to the bank
- Recruit and conduct interviews for open analyst positions
- Cross train new employees on fraud database systems
- Create, monitor, and process database and paper files using MS Access and Excel
- Maintain statistics and prepare month end reports
- Provide support for special projects analysis and presentations
- Restrict customer accounts for Customer Identification Policy compliance

- Place foreign currency orders and balancing general ledger accounts to ensure accuracy of currency received and disbursed
- Monitor work flow and staffing needs to ensure service levels and deadlines were met
- Daily assignment of job duties, create and maintained department work schedules

Education

Bachelors of Business Management : Human Resources University of Phoenix

University of Phoenix: Bachelors of Business Management with a Minor in Human Resources

Skills

Software Applications

- PeopleSoft, Commercial Electronic Office, FileNet, Hogan, Microsoft Outlook, QuickBooks, SEI Trust 3000, Trust Real Estate Management System, Trust Mineral Management System, SharePoint, Kronos, LexisNexis, Lotus Notes

Computer Skills

- Proficient in Microsoft Excel, Word, PowerPoint, Publisher, Access, 12,000 KSPM ten-key, Accurate typing 75+WPM

Professional Skills

- Strong analytical skills, ability to effectively multi-task, dependable, outstanding customer service skills, leadership skills, excellent problem solving skills