

BANKING OFFICER

Professional Summary

I am an adaptable and responsible IT Savvy seeking a mid-level position in the Finance, Technology or Fintech market. I have a BA in Economics with a master's degree in Management and my current job as a Banking Officer has provided me with a well-rounded background and enabled me to develop an analytical/logical approach to tasks, software skills, and the ability to work under pressure. I am a Talented Director of Finance with one-year background in sponsorship, fundraising and private event planning. Skilled in devising marketing plans to promote venues and events services. Proven history of building business through personal and professional networking.

Skills

- NMLS # 1796859
- Business development expertise
- Project Management
- Confluence, Jira, Salesforce, SQL
- Sales professional
- Financial Analysis
- Strategic plans
- Google G Suite, Keynote, Microsoft Office
- Technology-savvy
- Accounting, Recruitment
- Banking, Sales
- Budget, SQL
- Business development, Strategic
- Credit, Strategic plans
- Client, Website
- Decision-making, Articles
- Documentation
- Due diligence
- Finance
- Financial
- Financial Analysis
- Financial statements
- Mandarin
- Marketing
- Strategy
- Marketing
- Market
- Marketing collateral
- Money
- Microsoft Office
- Mortgage originator
- Newsletters
- POS
- Presentations
- Pricing strategy
- Producer
- Project Management
- Public relations
- Purchasing
- Real estate

Work History

Banking Officer , 10/2018 to Current

Company Name " City , State

- Analyzed customer profiles to identify appropriate products and provide value-added approaches to client issues.
- Complied with regulatory requirements, including the bank Secrecy Act, Anti Money Laundering & OFAC, etc.
- Top 3 Loan Sales producer and Top 1 Mortgage originator in North Denver market.
- Analyzed financial credit and underwrote to determine loan feasibility.
- Developed and maintained strong relationships with local real estate agents and small business owners.
- Supervised Asian Banking Center and directed internal activities, including community events and newsletters.

Director of Finance , 05/2019 to Current

Company Name " City , State

- Assessed budget plans and present costs to forecast trends and recommend changes.
- Executed financial due diligence tasks on daily basis to maintain optimal organization finances.
- Planned and designed product and pricing strategy for membership, increasing membership by 200%.
- Directed the Finance Committee and conducted the organization's annual budget and financial strategic plan.
- Formulated, prepared, and issued financial statements with 10% increased efficiency to ensure timely deliverables.

Marketing Specialist , 08/2017 to 09/2018

Company Name " City , State

- Created, improved, developed marketing strategic plans on the company's website and social media.
- Mentored and guided the executive team during business development decision-making to optimize profitability, marketing strategy, and communications planning.
- Increased credibility and client awareness by developing technical/non-technical marketing collateral and presentations, public relations campaigns, articles, and newsletters.
- Built 10+ strong partnerships with recruitment agencies, universities, and student associations.

Retail Store Manager , 08/2014 to 07/2015

Company Name " City

- Managed all aspects of store operations, including organization, maintenance, and purchasing functions.

- Kept orderly and accurate accounting records by monitoring sales documentation.
- Improved sales process and track with the implementation of a new point of sale (POS) system.

Education

Master of Management : Business Management , 05/2017

Colorado State University - City , State

Bachelor of Arts : Applied Economics , 05/2013

National University of Kaohsiung - Taiwan

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Interests

COMMUNITY LEADERSHIP AND INVOLVEMENT , Asian Pacific Development Center - Volunteer (2019 - Current) Center for Asian Pacific American Women - Conference Committee (2019)

Languages

Bilingual in Mandarin

Skills

- NMLS # 1796859
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- PProject Management
- CConfluence, Jira, Salesforce, SQL
- SSales professional
- FFinancial Analysis
- SStrategic plans
- GGoogle G Suite, Keynote, Microsoft Office
- TTechnology-savvy,
- Accounting, Banking, budget, Business development, credit, client, decision-making, documentation, due diligence, Finance, financial, Financial Analysis, financial statements, Mandarin, marketing
- Sstrategy, marketing, market, marketing collateral, Money, Microsoft Office, Mortgage originator, newsletters, POS, presentations, pricing strategy, producer, Project Management, public relations, purchasing, real estate, recruitment, Sales, SQL, strategic, Strategic plans, website, articles