

REGISTERED CLIENT SERVICE ASSOCIATE

Summary

To obtain a position where my years of experience in the client support environment and proven track record of maintaining and developing new businesses can be fully utilized. Results-oriented, high-energy, hands-on professional, with a successful record of accomplishments in client support. Major strengths include strong leadership, excellent communication skills, strong team player, attention to detail, compliance in all regulated environment and supervisory skills.

Skills

Microsoft Word for Windows, Excel, Power Point, Access, Adobe PageMaker 6.5, Adobe Photoshop, Dreamweaver, Visio, Unix, Oracle 9i and Developer 2000.

Experience

Registered Client Service Associate 06/2012 to Current Company Name City , State

- Serve as primary contact to investment clients and prospects.
- Provide all operational services and support for client accounts.
- Provide Financial Advisors with presentations and seminars, aide in the implementation of marketing materials for prospects.
- Referring clients to other lines of banking division to enhance the relationship.
- Work with Financial Advisors to efficiently manage their book of business to increase their revenue for the bank.
- Conduct monthly audits to make sure that client objectives are in consideration with the investments being offered by the brokers.
- Work directly with the Financial Advisors to manage their book of business worth 40 million.

Relationship Banker II 06/2004 to 06/2012 Company Name City , State

- Serve as primary contact to retail, commercial, and prospect clients.
- New account opening and cross sale of other banking products and services.
- Referring identified client needs to other lines of banking divisions.
- Proactively cold calling the clients to introduce the new products and services to increase branch revenue.
- Conduct meetings with commercial bankers and introduce the banking products to the commercial clients to enhance the banking relationship.
- Accomplishments.
- Ranked in top 10 among 82 reps for 7 straight years, exceeding sales quotas a month.
- Winner of best sales representative of the year reward 3 straight years and first quarter in 2011.
- Increased branch non-interest income by 10% with the sale of banking products and excellent client service skills.
- Increased the loan portfolio for the branch by \$800,000 within 7 months.
- Increased net deposit portfolio for the branch by \$1.7 million for the quarter by proven sales skills.
- Training new hires and branch personals to be experts in their job performance to be successful in the company.

Private Banker 01/2003 to 01/2004 Company Name City , State

- Conduct outside sales calls to bring in new business.
- Performing operational tasks of the branch that includes reconciliation and monitoring of Federal Reserve account.
- Opening new consumer, business accounts and creating CIF's, entering new accounts in the system using Impact.
- Performing many tasks using Impact such as change of address, customer account information, posting stop payments, and loan information.
- Assisted in reception handling high volume customer calls.

Technical Writer/ Web Developer 01/2000 to 01/2002 Company Name City , State

- Responsibilities include creating, editing and verifying product and service documentation.
- Documentation types include: hardware and software user and service manuals, online help and tutorials, programming/configuration/installation documents, requirement documents and reference documents.
- Work out various researches for giving the accurate description of the erection, installation, removal as well as maintenance of different genres of hardware.
- Supply wiring figures outlines along with part breakdown sketches for illustrations.
- Scripting interactive on-line help and tutorial packages.
- Installation and maintenance of computer, security, and telecommunications systems.

Education and Training

B.S : Computer Information Systems 2001 Strayer University Computer Information Systems

1997 Northern Virginia Community College DBA Training, Completed First DBA exam in India

Series 7-General Securities Registered Representative 2016

Skills

Dreamweaver, Adobe PageMaker 6.5, Adobe Photoshop, banking, book, cold calling, hardware, client, clients, DBA, Documentation, editing, Financial, investments, marketing materials, meetings, Access, Excel, Power Point, Windows, Microsoft Word, online help, Oracle 9, Developer 2000, outside sales, presentations, programming, reception, requirement, retail, sales skills, sales, Securities, seminars, Scripting, telecommunications, Unix, Visio, wiring