ROBERT SMITH

Sales Banker

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An experienced Sales Banker with 6 years of experiences seeking a growth and positive working environment better suited for my career goals and success, thus, allowing me to use my skills, knowledge, and background to maximize productivity for the benefit my employer and career.

EXPERIENCE

Sales Banker
Bank Of The Cascades - AUGUST 2015 – JANUARY 2016

- Created member account profiles on the bank of the cascades online banking program.
- Answered telephone inquiries on banking products including checking, savings, loans and lines of credit.
- Advised clients on home equity, educational and personal loans and lines of credit.
- Compiled database of loan applicants credit histories, corporate financial statements and other financial information.
- Developed and maintained relationships with local real estate agents.
- Submitted loan applications to the underwriter for verification and recommendations.
- Complied with regulatory requirements, including the bank secrecy act, anti-money laundering, OFAC, USA patriot act, privacy act, and community reinvestment act.

Personal Banker /Small Business Specialist
Chase Bank - JULY 2010 – JULY 2015

- Executed customer transactions, including deposits, withdrawals, money orders and checks.
- Rapidly and efficiently prepared customer and atm cash and change orders.
- Submitted loan applications to the underwriter for verification and recommendations.
- Maintained strict confidentiality of bank records and client information.
- Answered clients questions about the purposes and details of financial plans and strategies.
- Interviewed clients to determine current income, expenses, insurance coverage, tax status, financial objectives, risk tolerance and other information needed to develop a financial plan.
- Maintained confidentiality of bank records and client information.

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EDUCATION

- Associates in Process in Psychology/Sociology - (Klamath Community College - Klamath Falls, OR)

SKILLS

Finance, Bookkeeping, Accounts Payable, Accounts Receivable, Administrative Duties, Management, Microsoft Office, Spreadsheets, And Customer Service.