ROBERT SMITH

Client Financial Analyst

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Client-focused relationship manager, dedicated to exceeding client expectations, seeking a career opportunity to utilize my experience with business development to build and maintain strong working relationships with customers.

EXPERIENCE

Client Financial Analyst
ABC Corporation - 2014 – 2014

- Offered and sold financial products and services to consumers and small business customers.
- Interacted with customers to meet needs.
- Openned deposit accounts, handle loan applications, and manage various customer service requests.
- Leveraged in-depth product knowledge to assist the bank in meeting its goals.
- Conducted Audits within branch banking, and coordinated projects for reporting and operational initiatives.
- Advised and educated customers regarding deposit account services, checking, savings, money markets, CDs, IRAs, and other products.
- Increased account base by 10% deposit growth in 1 year through extensive networking, sponsorships and by actively participating in various events.

Client Financial Analyst
Delta Corporation - 2010 – 2012

- Production Billing Receive, distribute and track vendor invoices for approval Receive calls from vendors to assist them in receiving payment on aged .
- Since I was a Banking Officer here as well, my job entailed almost the same description as above except that I also conducted seminars and .
- Managed assigned portfolio of accounts for production, intercompany, publication, and studio in a stand-alone role Performed weekly report & actual vs.
- estimate/budget variance analysis to finance manager and account management team Reviewed inventory level weekly with account manager to minimize .
- Aside from addressing clients traditional product and services banking needs, I also utilized my series 6/63 as well as Life and Health Insurance .
- Assisted clients with all of their personal banking needs.
- Focused on promoting bank products and services to employees of

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local companies through a bank at work program.

EDUCATION

- GED

SKILLS

Business Development , Mortgage Specialist, Microsoft Applications, Banking Software,.