

ROBERT SMITH

Financial Sales Consultant

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SUMMARY

Goal-Driven Multitasking Financial Sales Consultant with 10 years of experience in the Finance domain. Experienced with expertise in Retail and Business Banking, Financial Analysis and Cash Flow Forecasting.

SKILLS

Cash Management, Financial Analysis, Financial Reporting, Forecasting, Customer Service, Computer, Banking, Communication

WORK EXPERIENCE

Financial Sales Consultant

PNC Bank - January 2013 – Present

- Expert in analyzing customers long-term and short-term needs and making the appropriate recommendations to meet their banking and investment goals.
- Using the exceptional communication skills to educate customers about banks products and services to enhance their financial well-being.
- Partnering with the business associates in the areas of private client group and wealth management to help customers meet their banking and investment goals.
- Expert in business banking account opening processes and documentation requirements.
- Expert in consumer and commercial loan origination and loan closing processes.
- Recognized by PNC branch managers for supporting their branches while on leave.
- Training the newly hired employees about bank policy, product knowledge, and banking regulations.

Financial Sales Consultant

ABC Corp - 2007 – May 2012

- Engaged in robust conversations with clients to uncover additional needs.
- Made daily cold calls successfully leading to sales with new and existing clients.
- Delivered 5-star customer services by averaging 4.93 customer services satisfaction rating.
- Developed qualified referrals for the company and emphasized asset custody and trust-related services.
- Used sales experience, product and procedural knowledge, and willingness to consultatively guide customer issues towards quick resolutions.
- Sales included home lending products, investment advising, consumer and business products, credit cards, online banking etc.
- Achieved top sales by closing over \$2,000,000 in booked business for the fiscal year 2011.

SCHOLASTICS

- M.S. in Public Administration - 2005 (Exeter University - Exeter)international Finance - 1989 to 1992(University Of Maryland - College Park, MD)