

# ROBERT SMITH

## Financial Sales Consultant

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Highly motivated, dependable, Financial Sales Consultant with 6 plus years of experience, offering strong technical and interpersonal skills to provide quality service to an employer and their customer base. My motivation to excel, desire for challenge, combined with my willingness to learn and work with others will make me an indispensable member of your team.

### **JUNE 2013 - PRESENT**

#### **FINANCIAL SALES CONSULTANT - PNC BANK BURK VA**

- Providing unparalleled customer service to both existing and prospective clients in an effort to win and retain their business.
- Writing and preparing the transaction related documentation and marketing materials including information memoranda, pitch books, corporate profiles, and market data and analyses.
- Serving as a critical team member in the execution of advisory and financing transactions.
- Performing in-depth company and industry research supporting specific client engagements and marketing opportunities.
- Initiating conversations with clients, and using these opportunities to build awareness and then sell a variety of PNC bank products or services.
- Developing strong relationships through customer profiling and needs-based selling.
- Identifying the financial needs of customers and recommending the PNC products and services to meet those needs.

### **JULY 2012 - 2013**

#### **FINANCIAL SALES CONSULTANT - ABC CORP**

- Managed, assessed adhered to risk while on single dual custody during daily branch operations.
- Identified and avoided the loss for the branch by maintaining a strict adherence to cash management, KYC/AML fraud triangle policies at all times. Proficient processing of CTR, SAR, and SIR reports.
- Cultivated relationships broaden share of wallet through universal banking sales for Checking, Savings, Money Market, IRA, Heil, Heloc, Business, Merchant Services, Debit Credit Card Accounts, Personal Secured, Unsecured Auto Loans.
- Identify assist in mortgage investment referrals/sales.
- Regional leader in these complex financial product sales.
- Evaluated the customers potential needs and made appropriate recommendations.
- Helped members with their basic financial transactions ( such as conducting

deposits, and withdrawals, posting credit card payments, and balance transactions, receiving debit cards and check orders, etc. ).

## **EDUCATION**

Master in Business Administration in Healthcare Management - June 2015(Saint Leo University )Bachelor Of Science in Health Care Administration - May 2014(Kaplan University )Associate Of Applied Science in Health information Technology - July 2012(Kaplan University )Diploma in Public Relations & Business Communication - July 2004(Graduate School Of Management )High School Diploma in information Management - November 1996(Adisadel College ) Vocational - (National Vocational And Training Institute )

## **SKILLS**

Languages: Bilingual English And Spanish Communications, Effectively Handle Internal And External Customers At All Levels., Microsoft Office, Microsoft Word, People Soft