

# ROBERT SMITH

## Licensed Banker

[info@qwikresume.com](mailto:info@qwikresume.com) | [LinkedIn Profile](#) | [Qwikresume.com](#)

4+ years of experience as a Licensed Banker is seeking to obtain a position within a company that will afford an opportunity for growth and development while allowing me to enhance the profitability of the company through my expertise and excellent customer service.

## EXPERIENCE

### Licensed Banker

#### **Citizens Bank - JANUARY 2015 - PRESENT**

- Managing the team to meet sales goals, along with coaching around investment conversations.
- Setting appointments for additional opportunities and follow up for previous meetings.
- Profiling clients in order to determine long-term goals, which would guarantee the client a successful legacy.
- Maintaining exceptional Customer Service while offering products that meet clients immediate and future needs.
- A constant focus on product knowledge and product offerings of competitors.
- Profiling Clients to determine their needs around Lending options. i.e., Mortgage products, Home equity products, Personal lending, credit cards, Small business and Commercial Lending.
- Organizing morning huddles to focus on sales goals, expectations, daily focus and Customer score ratings.

### Financial Service Representative

#### **TD Bank Bank NA - JUNE 2014 - DECEMBER 2014**

- Safe Registered, which allows me to offer Mortgages, Equity Loans Lines.
- Profiling clients in order to determine adequate products to ensure that future needs are met in reference to retirement and ensuring their legacy maintained in the event of death while protecting their assets. Meeting the financial needs of clients with a wide range of lending options.
- Offering exceptional Customer Service while doing whats in the best interest of the client.
- Manage and coach the teller line and Customer Service Reps in Service and Sales.
- Work closely with my team in regards to sales goals, product knowledge and meeting customer service metrics.
- Set appointments with clients to access their financial portfolio
- Reviewed payments from managed care organizations looking for

discrepancies in the amounts received with the amounts in accordance with the contractual agreement.

## EDUCATION

- BS in Fashion Design - August 2006 to February 2008(Art Institute Of Philadelphia - Philadelphia, PA )

## SKILLS

Excel, Fast Learner., Microsoft Word, Organization, CRM, Adobe, Lotus Notes, Net Query, And Chanel Link.