

# ROBERT SMITH

## Relationship Associate

Phone: (0123)-456-789 | Email: info@qwikresume.com | Website: Qwikresume.com

### SUMMARY

Driven, proactive Relationship Associate professional seeking Executive Assistant position for a CEO that utilizes extensive knowledge of effective multi-tasking, resourceful scheduling coordination, office, and accounting management. Also experienced in event planning.

### CORE COMPETENCIES

Communication, Organizational, Multi-tasking, Self-Motivated, and Detail Orientated.

### PROFESSIONAL EXPERIENCE

#### Relationship Associate

**ABC Corporation - March 2008 – September 2008**

##### Key Deliverables:

- Researched current industry trends to assist in sales and account expansion by generating leads.
- Produced client and prospect pipeline for the relationship managers.
- Oversaw and produced print management needs including pitch books, financial quarterly reports, asset allocation studies press articles, publications, and other collateral.
- Attained product and investment details for Private Bankers using various tools and software.
- Participated in client proposal presentations, client meetings, and brainstorming meetings to provide creative ideas and solutions for the best way to visually communicate goals and messages.
- Handled and processed all documents related to client accounts and account maintenance.
- Applied proper enhanced due diligence measures and compliance guidelines.

#### Relationship Associate

**Delta Corporation - 2003 – 2008**

##### Key Deliverables:

- Solicited client feedback via phone survey and questionnaire tools Managed clerical and administrative duties (copying, faxing, filing, scanning, etc.)
- Sell banking products by identifying customer needs Provide quality, accurate, and efficient customer service Develop relationships with customers.
- Holder of Branch Master Keys Substitute Branch Opener.
- Interacted with client contacts and bank partners to maximize customer retention and identify cross-sell opportunity Assisted relationship managers.
- Deepen relationships by connecting customers to sales specialists and offering appropriate financial solutions and services to both individuals.
- Managed all customer service for all assigned relationships 3.) Monitored reports to manage past-dues and loans.

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- Assisted Relationship Managers with the management and maintenance of problem commercial and corporate loan commitments using a retention decision.

### EDUCATION

- Diploma