
Bank Financial Advisor Resume

Job Objective

Looking for work as a Bank Financial Advisor with an organization today in order to practice my skills and experience in the industry.

Summary of Qualifications:

- Remarkable sales experience in financial industry
 - Profound knowledge of financial industry
 - Ability to manage financial products and provide fee-based advice and planning services
 - Good understanding of mortgage banking, credit analysis and consumer lending policies and procedures
 - Possess PC skills and systems knowledge
 - Excellent organizational, presentation and client relationship management skills
 - Ability to identify cross-sell opportunities and refer customers to the bank
 - Ability to sell and refer financial opportunities
 - Amazing ability to quickly learn about financial products and services
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Work Experience:

Bank Financial Advisor, August 2005 – Present
ViewPoint Bank, Mass, MI

- Recognized the prospecting opportunities within the community.
- Provided ongoing training to branch personnel to maximize their knowledge level and ability to profile and refer clients.
- Provided timely feedback to internal referral sources regarding referral results.
- Implemented the effective marketing and business development initiatives with the branches.
- Actively identified and made referrals to all business partners.
- Contacted all leads provided by various internal lead generation programs.
- Analyzed client goals in all areas of financial planning including cash, debt, risk, tax, retirement, investment and estate planning.

Bank Financial Advisor, May 2000 – July 2005
Sovereign Bank, Mass, MI

- Increased revenues and profits by building strategic client and business partner relationships.
 - Referred customers to the appropriate service provider and executed highly customized solutions to meet the needs of the customer.
 - Developed profitable and business partnerships.
 - Provided the securities, annuities and insurance products to new and established accounts.
 - Developed new business through leads generated from partnering and relationship building skills.
 - Recommended prudent and suitable investment to individual and corporate clients.
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Education:

Bachelor's Degree in Finance, Rockefeller University, New York, NY

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