
Private Banker Resume

Job Objective

Seeking employment as Private Banker in a reputed firm where I can apply my knowledge and experience in banking to the fullest.

Highlights of Qualifications:

- Exceptional experience in selling various products and services of banks to clients
 - Immense knowledge of credit products and consumer deposits
 - Admirable knowledge of macro and micro economic issues
 - Sound knowledge of borrowing and non borrowing bank products
 - Familiarity with all banking products, lending products and policies
 - Proficient with Microsoft Office software
 - Ability to evaluate financial data for clients
 - Ability to communicate with all internal staff members and external clients
 - Ability to resolve issues efficient for private bankers
 - Ability to understand and assess clients' needs
-

Professional Experience:

Private Banker

Associated Bank, New York, NY

August 2007 – Present

- Developed strategies to ensure asset growth for private banks through personal contacts.
- Utilized all bank resources to strengthen present client base and gain customers.
- Analyzed client requirement and referred to appropriate department for assistance.
- Administered cross selling of all bank products and services.
- Established appropriate bank product and services as per individual financial requirement.
- Maintained efficient relationship with existing client base to facilitate increase in revenue.
- Maintained record of all loan and deposit portfolios as per business line.
- Participated in various community activities to maintain image in marketplace.

Private Banker

Fifth Third Bank, New York, NY

May 2004 – July 2007

- Maintained professional banking relationship with all affluent banking customers.
 - Coordinated with customers to analyze their financial requirements and made recommendations.
 - Developed loan packages for credit evaluation and underwriting processes.
 - Analyzed all changing requirements of clients and recommended appropriate bank products.
 - Maintained and strengthened customer base to serve present clients in private bank portfolio.
 - Facilitated regular communication with external resources to develop new businesses.
 - Maintained knowledge of market conditions at all times.
 - Obtained various referrals from clients and internal business partners.
-

Education:

Bachelor's Degree in Finance

Holy Names University, Oakland, CA

[Build your Resume Now](#)