



Patrick Morgan

Banking center manager with a strong background in financial management, customer service, and risk management. Demonstrated success overseeing daily operations, improving customer satisfaction, and leading top-caliber teams.

PROFESSIONAL EXPERIENCE

January 2019 - Present

Banking Center Manager | ABC Finance Inc. | Boston

- Train, supervise, and evaluate a 15-member team, ensuring adherence to the bank's policies and procedures
- Streamlined daily reporting procedures, increasing efficiency by 15%
- Resolved various customer issues, decreasing complaints by 30% within the first year

June 2015 - December 2018

Assistant Banking Center Manager | LMN Bank | Philadelphia, PA

- Helped streamline daily operations of the banking center, improving productivity by 12%
- Co-developed service strategies that increased customer satisfaction ratings by 20%
- Trained and motivated a team of 10, fostering a high-performance work environment

EDUCATION

Master of Business Administration (MBA)

Harvard Business School, Boston, MA |

Bachelor of Science in Finance

University of Pennsylvania – The Wharton School, Philadelphia, PA |

PROFESSIONAL DEVELOPMENT

Certified Financial Services Auditor (CFSA), Institute of Internal Auditors, February 2014

Certified Anti-Money Laundering Specialist (CAMS), Association of Certified Anti-Money Laundering Specialists


Certified Trust and Financial Advisor (CTFA), American Bankers Association

CONTACT

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KEY SKILLS

- Customer service and retention
- Financial management
- Process streamlining
- Risk management and mitigation
- Team leadership