



Taylor Smith

Relationship Banker

Customer-focused relationship banker with 5+ years of experience building and managing portfolios of retail and small-business clients. Grew total deposits by 22% and loan balances by 18% across a 250+ client portfolio, generated \$1.2M in new revenue through cross-sell referrals, and onboarded 150+ new clients annually at Community First Bank. Proven at deepening client relationships through needs-based financial planning, digital banking adoption, and proactive portfolio management.

CONTACT INFORMATION



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Seattle, WA

EDUCATION

Bachelor of Science in Business Administration | May 2016
State University, City, ST

KEY SKILLS

- Client portfolio growth and management
- Cross-selling financial products and services
- Needs analysis and financial solution design
- Client issue resolution and escalation management
- Digital banking promotion and adoption
- New client onboarding and relationship development
- Sales performance coaching and team mentoring
- Retail and small-business banking products
- Regulatory compliance and CRA requirements

PROFESSIONAL EXPERIENCE

- **Relationship Banker, Community First Bank | City, ST**
August 2019 – Present
 - Managed a portfolio of 250+ retail and small-business clients, growing total deposit balances by 22% and loan balances by 18% within two years through proactive relationship management
 - Identified cross-sell opportunities through structured needs analysis conversations, resulting in 600+ product referrals and \$1.2M in new revenue during the most recent fiscal year
 - Resolved complex client service issues through a structured escalation and resolution process, achieving a 95% satisfaction rate and reducing overall client attrition by 15%
 - Developed a quarterly outreach cadence for top-tier clients including investment reviews and financial wellness check-ins, increasing average products per household from 2.4 to 3.8
 - Partnered with mortgage, investment, and business banking specialists to deliver comprehensive financial solutions, contributing to 80+ cross-department referrals annually
 - Trained and mentored 3 junior relationship bankers on portfolio management techniques, needs-based selling, and compliance protocols, improving team cross-sell ratios by 18%
- **Personal Banker, Neighborhood Trust Co. | City, ST**
June 2016 – July 2019
 - Onboarded 150+ new clients annually through referral cultivation and branch walk-in conversion, achieving 110% of annual recruiting targets each year across the 3-year tenure
 - Promoted digital banking adoption including online bill pay, mobile deposit, and e-statement enrollment, increasing digital channel utilization by 40% across the assigned client base
 - Trained and mentored 8 junior bankers on sales techniques, product knowledge, and compliance requirements, improving team sales performance metrics by 25% over 6 months
 - Consistently ranked in the top 10% of branch bankers for cross-sell products per household, earning quarterly sales recognition awards in 5 of 8 reporting periods