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Jamie Wilson

Personal Banker

Dedicated personal banker with 5+ years of experience delivering consultative financial advice, managing deposit and lending relationships, and achieving cross-sell targets in retail banking. Managed a book of 300+ clients growing deposits by 28% and loans by 20%, generated \$950K in ancillary revenue through product sales, and maintained a 96% customer satisfaction rate at Central National Bank. Skilled at identifying financial needs, recommending solutions, and building client loyalty through proactive relationship management.

CONTACT INFORMATION



(555) 000-0000



email@example.com



City, ST

EDUCATION

- Bachelor of Science in Finance I
May 2016

State University, City, ST

KEY SKILLS

- Consultative needs analysis and financial planning
- Deposit and loan product sales and cross-selling
- Client service issue resolution and escalation management
- Cross-sell campaign execution and pipeline management
- Digital banking adoption and client education
- New client onboarding and relationship development
- Transaction accuracy and teller operations
- Compliance and BSA regulatory adherence
- Portfolio management and client retention strategies

PROFESSIONAL EXPERIENCE

Personal Banker | Central National Bank | City, ST
July 2018 - Present

- Managed a book of 300+ retail clients, growing total deposit balances by 28% and loan balances by 20% over two years through regular financial reviews and proactive product recommendations
- Recommended and sold 1,000+ consumer lending and savings products including personal loans, home equity lines, and CDs, generating \$950K in ancillary revenue during the most recent fiscal year
- Resolved complex service issues including wire disputes, overdraft reviews, and fraud claims with a 96% customer satisfaction rate, reducing branch-level escalations by 22%
- Executed quarterly cross-sell campaigns targeting underserved client segments, increasing average products per household from 2.1 to 3.6 and boosting campaign conversion rates by 30%
- Partnered with mortgage, investment, and small-business banking specialists on 60+ joint client appointments per year, generating \$400K in cross-department referral revenue
- Mentored 2 new personal bankers through a 90-day onboarding program covering product knowledge, needs-based selling, and compliance requirements, both achieving top-quartile performance within 6 months

Universal Banker | Citywide Credit Union | City, ST
May 2016 - June 2018

- Handled dual teller and advisory responsibilities for 50+ daily transactions, achieving 99.7% transaction accuracy across a 2-year tenure and zero cash discrepancies
- Educated customers on financial tools and digital banking channels including mobile app, online loan applications, and e-statement management, increasing mobile app enrollments by 45%
- Supported new account openings and loan applications, contributing to a 20% increase in branch new-member acquisitions during the peak growth period
- Maintained compliance with credit union policies and BSA requirements, participating in quarterly audit reviews with zero procedural exceptions noted