


# Jordan Miller

## Private Banking Relationship Manager

Trusted private banking relationship manager with 8+ years of experience cultivating high-net-worth client relationships and delivering bespoke investment, lending, and trust solutions. Managed a \$350M AUM portfolio for 80 UHNW clients achieving 10% CAGR over 4 years, originated \$50M in lending facilities increasing fee income by 20%, and generated a 30% uplift in referrals through 100+ client events at Elite Wealth Bank. Expert at growing AUM, structuring custom credit solutions, and deepening multi-generational wealth relationships.

## CONTACT INFORMATION

 (555) 000-0000

 email@example.com

 City, ST

## EDUCATION

Bachelor of Arts in Economics  
State University, City, ST  
May 2014

## KEY SKILLS

- AUM growth and high-net-worth portfolio management
- Bespoke credit structuring and lending solutions
- Client event planning and relationship deepening
- Trust, estate, and wealth-transfer planning
- Investment strategy and asset allocation advisory
- Referral generation and network development
- Fee income growth through product cross-selling
- Regulatory compliance (FINRA, SEC, fiduciary)
- Family office and UHNW client engagement

## PROFESSIONAL EXPERIENCE

### Private Banking Relationship Manager | Elite Wealth Bank | City, ST June 2017 – Present

- Managed an AUM portfolio of \$350M for 80 ultra-high-net-worth clients, achieving a 10% CAGR over 4 years through disciplined investment strategy and proactive portfolio management
- Originated \$50M in customized lending facilities including real estate bridge loans, margin lending, and aircraft financing, increasing fee income by 20% and deepening product penetration across the client book
- Organized 100+ client events and educational seminars per year including market outlook dinners, estate planning workshops, and private equity briefings, boosting client engagement scores and referrals by 30%
- Onboarded 12 new UHNW client relationships per year with an average initial deposit of \$5M, growing the book from \$250M to \$350M in AUM over 4 years
- Collaborated with internal specialists in trust, tax, and lending to deliver comprehensive wealth planning for 30+ multi-generational families, generating \$3M in annual fee revenue from complex planning engagements
- Retained 98% of the client book during a major market downturn through proactive communication, portfolio stress-test reviews, and personalized risk management consultations

### Relationship Manager | Premier Financial | City, ST May 2014 – May 2017

- Advised 50 affluent clients on investment strategies and financial planning, growing individual portfolios by 15% annually through asset rebalancing, opportunistic repositioning, and tax-loss harvesting
- Cross-sold wealth planning, trust, and insurance services to existing clients, generating \$500K in new recurring fee revenue and increasing average products per client from 2.3 to 3.7
- Developed a referral network with 20 CPAs and estate attorneys that generated 8 new client introductions per year, contributing \$40M in new AUM over the 3-year tenure
- Managed client portfolio reviews, quarterly statements, and financial planning updates for 50 relationships, maintaining a 4.8/5.0 client satisfaction score on annual surveys