

YOLANDA FITZHUGH

Personal Banker

Senior personal banker with 12 years in branch banking, most recently anchoring a flagship location as the lead banker and informal mentor. Deep experience with mass-affluent households, small business owners, and complex account structures including trusts and estates. Regularly asked to handle the branch's most sensitive client situations.

CONTACT INFORMATION



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EDUCATION

B.S. in Business Administration,
Portland State University, 2011

NMLS registration, active and in
good standing since 2013

Bank marketing and customer
relationship coursework, ABA, 2022

KEY SKILLS

- Mass-affluent household relationship management
- Small business account opening and treasury referrals
- Trust, estate, and POA account structures
- Investment and insurance referrals to licensed partners
- HELOC, portfolio loan, and secured credit intake
- BSA/AML, CIP, and Reg CC day-to-day application
- Salesforce Financial Services Cloud
- nCino for small business onboarding
- Team mentoring and new-hire ramp
- Branch audit preparation

PROFESSIONAL EXPERIENCE

Senior Personal Banker | Cascade Meridian Bank, Portland, OR 2020 – Present

- Anchor a portfolio of 210 mass-affluent households with about \$57.8M in deposits and \$19.4M in investment referrals under advisor management.
- Lead the branch's small business desk, opening 40 to 55 business accounts a year and pairing owners with treasury and lending partners.
- Handle trust, estate, and power-of-attorney account setups the rest of the team escalates upward.
- Mentor 3 to 5 bankers at any given time on discovery conversations, product fit, and referral handoffs.
- Selected as one of 12 regional bankers to pilot a new client planning tool ahead of the 2024 rollout.

Personal Banker II | Willamette Federal Savings, Beaverton, OR 2016 – 2020

- Managed a book that grew from \$14M to \$28M in deposits over four years.
- Ranked #2 out of 47 bankers in the region for referral revenue in 2019.
- Trained 9 new bankers on the platform system and account opening workflow.
- Represented the branch on a working group that rewrote the bank's new-account discovery script.

Personal Banker | Willamette Federal Savings, Hillsboro, OR 2013 – 2016

- Opened deposit and consumer credit accounts for a growing suburban market.
- Grew personal referral pipeline to about 15 qualified appointments per month.
- Earned the bank's Rising Star award in 2015.
- Cleared two full compliance audits with no personal findings.

Teller and Lead Teller | Willamette Federal Savings, Hillsboro, OR 2011 – 2013

- Balanced vault and ATM as lead teller across a 6-person team.
- Trained new tellers on cash handling, CTR filing, and dual control procedures.
- Flagged and referred multiple structuring cases to the BSA team.
- Promoted to Personal Banker after 20 months.