

NOLAN KAUR

Personal Banker

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Profile

Personal banker with 7 years of experience in account opening, needs-based sales, and BSA/AML compliance. Grew branch revenue 16.07% year-over-year by recommending suitable loan and deposit products matched to client financial goals, and scored 98.64% on a 2024 internal compliance audit. Passed the Series 63 state securities law exam and works across banking software and online banking platforms.

Key Skills

- BSA/AML Compliance
- Consumer Lending
- Account Opening Procedures
- Banking Software
- Microsoft Outlook
- Online Banking Platforms
- Needs-Based Sales
- Cash Handling
- Financial Product Knowledge
- Loan Application Processing

Professional Experience

Personal Banker

Judith Basin Community Bank, Lewistown, MT | 2022 - Present

- Opened an average of 37 new checking, savings, and money market accounts per month by conducting needs assessments during walk-in and scheduled appointments.
- Grew branch revenue 16.07% year-over-year by recommending suitable loan and deposit products matched to client financial goals.
- Scored 98.64% on a 2024 internal compliance audit covering BSA/AML documentation, identification verification, and disclosure requirements.
- Processed an average of 118 daily transactions in the banking system, balancing cash drawers to within $0.12 variance per shift.

Personal Banker

Flathead Trail Savings Association, Great Falls, MT | 2020 - 2022

- Opened 29 new accounts per month during the first year, increasing to 34 per month by streamlining the application workflow.
- Achieved a compliance audit score of 98.5 out of 100 across two consecutive semi-annual BSA/AML reviews.
- Guided clients through online and mobile banking enrollment, reducing in-branch service requests by 43 per week.

Banking Associate

Musselshell Valley Financial Group, Roundup, MT | 2019 - 2020

- Assisted personal bankers in opening 22 new accounts per month while handling document preparation and identity verification.
- Contributed to a 13.14% year-over-year revenue increase by identifying product needs during routine teller interactions.
- Maintained a zero-error record on 97 daily cash transactions over a 14-month period.

Education

Bachelor of Science in Business

Montana State University, Bozeman, MT | 2015 - 2019

Certifications

- Series 63 Uniform Securities Agent State Law Exam, North American Securities Administrators Association, 2021