

SVP, REGIONAL SALES DIRECTOR WEALTH MANAGEMENT

Executive Profile

* Exceptional follow-through abilities and detail oriented; able to plan and foresee strategies from concept to successful completion * Versatile; proven ability to manage multiple projects * Able to build lasting rapport; possesses strong interpersonal skills; able to work effectively with individuals on all levels, effective motivator of self and others * Capable speaker and communicator, with refined skills in presentations, education, and client relations building * A resource person, problem solver, trouble shooter and a creative turnaround banker * Self-assured, confident, dependable and responsible in pursuing and closing sales; thrive in challenging situations requiring the ability to learn new skills Associate with an organization that will benefit from my initiatives, capabilities and contributions, ultimately qualifying for advancement and increased decision-making responsibilities:

Core Accomplishments

- Developing business within emerging and highly competitive business market; outstanding presentation, leadership qualifications
- Responsible of managing a team of 24 relationship managers for delivering personalized financial strategies to affluent clientele through banking and borrowing needs, as well as, investments services. My responsibility and accountability is to manage a team that service a portfolio of affluent households with investable assets of \$500, 000 up to \$2,000,000 . The primary objective of this trusted advisor is to grow client assets, retain and acquire new clients through being the single point of contact for all banking needs.. This role will require a holistic delivery of outstanding service and sales solutions to meet clients' financial needs and goals

Professional Experience

Company Name September 2014 to Current SVP, Regional Sales Director Wealth Management

City , State Responsible of managing a team of 24 relationship managers for delivering personalized financial strategies to affluent clientele through banking and borrowing needs, as well as, investments services. My responsibility and accountability is to manage a team that service a portfolio of affluent households with investable assets of \$500, 000 up to \$2,000,000 . The primary objective of this trusted advisor is to grow client assets, retain and acquire new clients through being the single point of contact for all banking needs.. This role will require a holistic delivery of outstanding service and sales solutions to meet clients' financial needs and goals.

Company Name April 2014 to September 2014 SVP, Group Leader

City , State Managed Citizens Bank's Business Banking Contact Center in RI and PA, this was a Short term project to enhance the client experience and to create efficiencies in all Phonebank related sales activities. Total FTE responsible 210

Company Name April 2004 to March 2014 SVP, Regional Manager-Business Banking Group

City , State * Manage a team of 21 Business Banking Officers in Boston Downtown Region * Member of Citizens Management advisory council.

Company Name January 2002 to April 2004 Business Banking Officer

City , State

Company Name April 2000 to December 2001 Branch Business Banker

City , State

Company Name January 1997 to January 1999 Department Head, Men's Wear

City , State * Managed a sales staff of 15 and established a follow-up program for the sales team * Expanded Dockers Men's Wear business from \$2 mil to \$3 mil while maintaining gross margin in excess of 50% * Analyze needs, submit recommendations and implement cost-effective programs encompassing market research, sale support materials and customer services

Education

Babson College Executive Education 2011 MA : Executive Leadership Management Programme Babson College Executive Education Executive Leadership Management Programme 2011 Investment Licenses Series 7 & Producers Life and Health registered in MA

Commercial Lending Training Program 2008 Citizens Bank Commercial Lending Training Program, Citizens Bank, 2008 Moody's Analytic's, inc..

University of Ottawa 1997 BSc : Economics BSc Economics 1997 University of Ottawa

Professional Affiliations

Citizens Management advisory council

Presentations

Capable speaker and communicator, with refined skills in presentations, education, and client relations building.

Skills

Sales, Market Research, Sales Staff, Sales Team, The Sales, And Sales, Clients, Regional Sales, Sales Director, Solutions, Wealth Management, Class, Client Relations, Closing, Closing Sales, Coaching, Comprehensive Large Array Data Stewardship System, Confident, Credit, Customer Service, Detail Oriented, Exceed, Journal, Leads, Problem Solver, Receptionist, Retail Sales, Self-Motivated, Territory, The Sale, Sales Activities, Series 6, Series 7