

John Bergsen

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A Vice President with 10+ years of experience within the banking industry, specializing in financial analysis, investment strategy, marketing, and regulatory compliance. A proven track record of building relationships with enterprise customers and identifying opportunities to enhance the growth of client portfolios.

Education

Master of Business
Administration (M.B.A.)
Temple University, Philadelphia, PA
September 2011 – June 2013

Bachelor of Science (B.S.) Finance
Temple University, Philadelphia, PA
September 2007 – June 2011

Education

- Investment Banking
- Regulatory Compliance
- Stakeholder Management
- Client Relations
- P&L Management

Certifications

- Certified International Investment Analyst (CIIA), ACIIA, 2016
- Certified Fund Specialist (CFS), IBF, 2013

Professional Experience

Vice President

Trust Bank, Philadelphia, PA | October 2016 – Present

- Oversee all aspects of client relationships for 15+ accounts valued at \$20M, expand revenue opportunities, conduct due diligence, and led client implementations to generate an additional \$1.2M in annual revenue
- Lead projects for client initiatives, serve as a liaison between client and business units to ensure successful implementation, and manage stakeholder expectations
- Coordinate cross-functionally with legal, enterprise risk, and compliance teams to mitigate financial risks and ensure regulatory compliance.

Senior Director

Corbin Financial, Philadelphia, PA | June 2013 – October 2016

- Managed and developed client relationships generating over \$24M in annual revenue for a leading investment firm, educated clients on new product capabilities and risk analytic tools, and successfully grew portfolio by \$5M
- Collaborated with product development, sales, and technology teams to expand product offerings, enhance the RFP process, and develop new value-added services