

Monica Reese

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Diligent and detail-oriented commercial banking associate with a 12-year track record for providing outstanding financial services to personal and business clients. Detailed knowledge of banking best practices and products with a talent for solving clients' problems. Assertive and inspiring leader with extensive experience training and overseeing junior colleagues.

Key Skills

- Mentorship and training
- Strong leadership style
- Relationship management
- Customer service
- Thorough understanding of regulation compliance
- Fluent in Spanish

Professional Experience

Commercial Banking Associate

Bank of San Francisco, San Francisco, CA | January 2013 - Present

- Trained seven new hires in 2020 and provided ongoing professional guidance and mentorship
- Support customers to open new depository accounts and assist with accessing online services, increasing service use by 45% in 2020
- Provide prompt and professional customer service, receiving consistent satisfaction ratings of 98% and above over four years
- Supervised a team of 12 colleagues and undertook performance management and target setting activities

Banking Associate

Bank of America, San Francisco, CA | July 2008 - January 2013

- Managed a workload of over 50 small business clients, multitasking and prioritizing tasks to ensure timely and consistent service
- Gathered information for new account holders by completing CIP and Enhanced Due Diligence forms
- Listen actively to clients' problems and requirements and suggest the most appropriate products, including personal loans and credit cards
- Promoted additional products and services, consistently ranking in the top 5% for upselling

Education

Bachelor of Science in Business Administration (Finance)

UNIVERSITY OF SAN FRANCISCO, San Francisco, CA
September 2004 - June 2008