Samantha Roberts

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A senior banking professional with ten years of experience specializing in portfolio management, business development, consultative sales, and commercial banking. A strong history of building relationships with high-value accounts and managing a multimillion-dollar book of business. Adept at developing and mentoring personal bankers to maximize sales performance.

Key Skills

- Personal Banking
- Commercial Banking
- Portfolio Management
- Financial Solutions
- Consultative Selling

Professional Experience

Relationship Banker

PNC Financial Services, Boston, MA | May 2016 – Present

- Manage a portfolio of 150+ clients with an average net worth of $600K, build and develop long-term business relationships, and increase client's deposit average by 70%
- Identify and recommend financial products and banking solutions based on client needs, utilize consultative sales techniques to deliver value-added services, and improve customer retention by over 25%
- Establish small and medium-sized business accounts and collaborate with home lenders and financial advisors to provide support for all customer financial needs

Personal Banker

PNC Financial Services, Boston, MA | May 2011 – May 2016

- Delivered retail and personal banking services to customers, managed transactions and wire transfers, ensured accurate deposits, and coordinated with clients and risk management teams to investigate potential fraudulent account activity
- Exceeded sales goals for deposits by 25% each month by conducting follow-up calls with 30+ clients per day and utilizing cross-selling techniques to generate new sales

Education

Bachelor of Business Administration (B.B.A.)

University of Boston, Boston, MA September 2007 - May 2011