

UNIVERSAL BANKER RESUME SAMPLE

Seasoned Universal Banker with 5+ years of comprehensive experience in retail banking, seeking to leverage my skills in customer service, sales, and financial transactions as a Universal Banker at Ridgewood Savings Bank. Committed to enhancing customer satisfaction and deepening client relationships while effectively promoting bank products and ensuring compliance with banking regulations.

PROFESSIONAL EXPERIENCE

August 20XX–Present

PEOPLE'S TRUST BANK, Ridgewood, NJ

Universal Banker

- Manage approx. 100 daily banking operations, including account openings, closings, and transaction processing, adhering to BSA and regulatory compliance
- Enhance the customer experience by proactively recommending banking products and services based on individual client needs, increasing customer retention by 20%
- Perform detailed customer verifications as part of the Customer Identification Program, ensuring all account setups comply with CIP/CDD requirements
- Trained and mentored 10 new tellers, improving transaction accuracy and customer service skills across the team

July 20XX–August 20XX

CITYWIDE FEDERAL CREDIT UNION, Ridgewood, NJ

Financial Advisor

- Accurately processed 200+ transactions daily, including deposits, withdrawals, and loan payments, balancing cash drawers with zero discrepancies
- Sold and managed ATM and Debit MasterCard, ensuring accurate data entry and timely delivery to customers
- Addressed and resolved customer inquiries and concerns, achieving a 95% customer satisfaction rating through effective communication and problem-solving
- Promoted to Universal Banker after demonstrating strong sales acumen and exceeding cross-selling targets by over 10%

CERTIFICATIONS

- Certification in Life Insurance — Issued: April 20XX

EDUCATION

May 20XX

RIDGEWOOD HIGH SCHOOL, Ridgewood, CA

High School Diploma

GPA: 3.7/4.0

ADDITIONAL SKILLS

- Customer service, sales proficiency, regulatory compliance, account management, fraud detection, financial advising, detail-oriented, Microsoft Office, problem resolution, cashing handling, time management