

Beckie Zusman

Personal Banking Specialist

Profile

I am a Personal Banking Specialist with over 5 years of experience in the financial industry. I have a deep understanding of personal banking products and services, as well as extensive experience providing exceptional customer service. I am passionate about helping others reach their financial goals, and I am dedicated to delivering superior service that always puts the customer first. In my previous role, I was consistently recognized for exemplary performance in sales, service quality, and teamwork.

Employment History

Personal Banking Specialist at Citizens Bank, MA

Mar 2022 - Present

- Exceeded monthly targets for new account openings by 15%.
- Grew the loan portfolio by \$500,000 through effective cross-selling.
- Successfully completed 50 hours of professional development training.
- Led a team of 5 personal bankers in providing excellent customer service.
- Received “Employee of the Month” recognition 3 times in 12 months.

Personal Banking Specialist II at Santander Bank, MA

Sep 2017 - Jan 2022

- Achieved a personal sales goal of \$2 million in new customer deposits within the first 6 months on the job.
- Grew existing customer relationships by an average of 20% per year, resulting in increased customer loyalty and satisfaction ratings.
- Consistently ranked as a Top Performer in Sales for Personal Banking Specialists II at our bank location.
- Helped train and develop 4 new Personal Banking Specialist I employees, 2 of which were promoted to Personal Banking Specialist II within 1 year.
- Recognized by management for displaying exemplary teamwork skills during times of high stress or volume.

Certificates

Certified Personal Banking Specialist (CPBS)

Apr 2021

Certified Financial Services Professional (CFSP)

Oct 2019

Memberships

American Bankers Association

Consumer Bankers Association

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📍 18 Flanders Rd, Westborough, MA 01581

Education

High School Diploma at Boston Latin School, Boston, MA

Sep 2013 - May 2017

Some skills I've learned are time management, communication, and organization.

Links

[linkedin.com/in/beckiezusman](https://www.linkedin.com/in/beckiezusman)

Skills

Personal Banking

Customer Service

Cash Handling

Teller Operations

Bank Deposits

Account Maintenance

Languages

English

Indonesian

Hobbies

Organizing personal finances

Studying personal finance blogs and articles

Creating a budget