


Leonor Figuereo

Private banker

A private banker with over five years of experience in the industry. I have worked with clients from all walks of life, and helped them to manage their finances effectively. My skills include financial planning, investment advice and risk management. I am a motivated individual who is always looking for new challenges. I am confident in my ability to provide excellent service to my clients.

leonor.figuereo@gmail.com 

(449) 675-0952 

1054 W 2nd Ave, Eugene, OR 97402 

Education

Bachelor of Science in Business Administration at University of Oregon

Sep 2013 - May 2017

I have learned excellent communication, organization, and time management skills while studying for my Bachelor of Science in Business Administration.

Links

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

Skills

Financial analysis

Investment planning

Risk management

Portfolio management

Financial modeling

Excel skills

Presentation skills

Employment History

Private Banker at US Bank, OR

Mar 2022 - Present

- Achieved annual sales goals by generating new business with high net worth individuals and families.
- Grew client base by 25% through effective networking and relationship management.
- Demonstrated expert knowledge of investments, banking, and financial planning to clients.
- Exceeded quarterly targets for loan growth and deposits.
- Negotiated favorable terms on behalf of clients for loans, lines of credit, and other financing products.
- Developed comprehensive wealth management plans incorporating investment strategies, risk tolerance analysis, estate planning needs assessment.

Associate Private Banker at Chase, OR

Aug 2017 - Jan 2022

- Achieved sales goals by proactively calling high net worth individuals and successfully pitching products that aligned with their needs.
- Grew book of business by 25% through effective cross-selling techniques.
- Demonstrated excellent customer service skills by resolving complaints and inquiries in a timely and efficient manner.
- Recognized as top performer in the department for 3 consecutive months.
- Developed strong relationships with clients which led to referrals and repeat business.
- Consistently met or exceeded daily call volume targets.

Certificates

Certified Private Banker (CPB)

Dec 2020

Certified Wealth Strategist (CWS)

Mar 2019

Memberships

American Bankers Association

The Institute of International Bankers