

Elena Vasquez

Private Client Relationship
Banker

CONTACT

(305) 789-1234

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United States, Miami, FL

EDUCATION

Bachelor of Arts in Economics

University of Florida, Gainesville, FL –
May 2015

Certifications

- **Certified Private Wealth Advisor** – Investments & Wealth Institute, 2025
- **Chartered Financial Analyst Level II Candidate** – CFA Institute, 2024
- **Series 66 License** – FINRA, Active since 2017

LANGUAGES

- Spanish (Fluent)
- Portuguese (Conversational)

AWARDS

- Top Performer Award, J.P. Morgan Private Bank, 2022
- Employee of the Quarter, J.P. Morgan Private Bank, Q3 2021
- Client Service Excellence, SunTrust Bank, 2018

PROFESSIONAL SUMMARY

Discreet and knowledgeable Private Client Banker with years serving high-net-worth individuals. Skilled in building trust, managing complex portfolios, and collaborating effectively with wealth advisors and estate planners to deliver tailored financial solutions.

EXPERIENCE

Private Client Relationship Banker

2020 - Now

J.P. Morgan Private Bank, Miami, FL

- Manage 50+ high-net-worth clients with total assets under management exceeding \$150M.
- Introduce innovative investment and lending products, boosting revenue per client by 25%.
- Collaborate closely with legal and tax professionals on comprehensive cross-border wealth management strategies.
- Develop customized financial plans addressing clients' unique goals and risk tolerance.

Relationship Banker

2016 - 2019

SunTrust Bank, Miami, FL

- Served affluent clientele, maintaining a 98% client retention rate.
- Facilitated seamless onboarding for new private banking customers.
- Conducted detailed financial needs assessments to identify appropriate banking products.
- Supported marketing initiatives by organizing client events and seminars.

SKILLS

Wealth management and portfolio optimization	★★★★★
Maintaining client confidentiality and trust	★★★★★
FINRA and SEC regulatory compliance	★★★★★
Market trend analysis and reporting	★★★★★
Client relationship development and retention	★★★★★