

## **Celia Avery**

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Personal banker with 12+ years experience **eagerly seeking to transition to a commercial credit analyst position**. Highly organized problem-solver, with demonstrated expertise in accounting, finance, and the consumer loan industry.

### **Strengths**

- \* Personal/commercial loan application reviews
- \* Attorney, lender and client liaising
- \* Teller/vault/safe deposit/DDA/credit expertise
- \* Registered tax preparation (CRTP)
- \* Loan application preparation and review
- \* Exceptional customer service and listening skills
- \* Account acquisition/management/maintenance
- \* Broad knowledge of credit/non-credit products
- \* GL credit and debit ticket preparation
- \* Legal document preparation
- \* Bank product sales
- \* Excellent written and verbal communications

*Bilingual – Fluent in English and Spanish*

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### **EMPLOYMENT HISTORY**

**Personal Banker III**, Exchange Bank, Rohnert Park, CA 1999 – Present

- Processes all new account transactions and assists customers in selection of various accounts and financial services
- Opens, maintains and closes personal accounts of all types, and provides expert guidance to customers on trusts, power of attorney, and a variety of other complicated financial matters
- Assists branch manager in gathering of financial and tax information for commercial loans, and regularly accompanies him on business calls to secure new commercial loans
- Gathers financial and tax data from loan applicants and forwards same to loan department
- Cultivates and maintains positive client relations through uncompromising customer service
  - \* Customers often request personal assistance and are willing to wait for availability

**Self-employed Registered Tax Preparer (CRTP)**, King Tax Service, Petaluma, CA 2007 – Present

- Prepares 1040 and other tax documents for individuals
- Performs 20+ hours of continuing education yearly

### **EDUCATION**

- Santa Rosa Junior College, Santa Rosa, CA – Pursuing Bachelor's Degree in Business Administration after completion of Associate Degree in 2012
- Rancho Cotate High School, Cotati, CA – Graduate