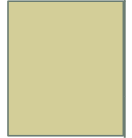


ANAYA, JORGE LUIS

690 S SAN MARCOS RD SANTA BARBARA, CA 93111

(818) 271-9160 ▪ Jorge.anaya321@gmail.com



Objectives

Individual with 3+ years of experience in financial services, banking and customer service. Looking to continue developing and expanding my skills and expertise in other branches of financial services and management, while being able to contribute with my knowledge and skills.

Experience

PERSONAL BANKER, WELLS FARGO BANK SEPTEMBER 2016 – PRESENT

- Responsible for effectively building long-term relationships with clients to better address the financial needs of each individual account. Overlooking customer accounts to ensure their financial success. Scheduling appointments for financial reviews.
- Uncover needs of each customer to help individuals succeed financially, whether it be through financial advice, referral to a partner, and/or through a platform product.
- Look at branch reports, credit pipeline, customer experience results to view growth and pin point areas of potential improvement. As well as, overlook reports that show overdrafts and fee customers have accrued.

WELLS FARGO AT WORK ADVOCATE, WELLS FARGO BANK SEPTEMBER 2018 – PRESENT

- Conduct research of potential businesses and organizations that would benefit of our Wells Fargo at Work program. A service in which employees and members of our customers' business or organization are informed of the benefits and services available through Wells Fargo.
- Conduct cold-calls and set up meetings for potential businesses that could partake events with financial literacy workshops, informational and programs.

VICE PRESIDENT OF FINANCES, THETA NU KAPPA MULTICULTURAL & ACADEMIC

FRATERNITY, INC. JANUARY 2014 – JANUARY 2015

- Overlooked the finances of the organization through member dues, fees and other expenses. Also, overlooked events such as fundraisers and philanthropy.
- Established more efficient procedures to process organization's finances; creating a spreadsheet that would help keep track of income, expenses and overall balances for the organization, while providing each member with reports of the organization's finances.

Skills

Computer Skills: Proficiency in Microsoft Suite (Excel, Word, PowerPoint), Microsoft Outlook, Windows/Mac

Skills & Knowledge: Bilingual in English/Spanish, Great verbal and written skills, Customer Service Experience 3+ years, Adaptable, Multitasking, Problem-solving, Detail-Orient, Tech-Savvy, Business Management, Presentation Skills

Education

UNIVERSITY OF CALIFORNIA SANTA BARBARA - SANTA BARBARA, CA September 2012 – June 2017 **MAJOR:** Sociology B.A.

References

UPON REQUEST