




# ELIAS SANTOS

Banker

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Denver, CO 



## PROFESSIONAL SUMMARY

Highly motivated and experienced Banker with over 5 years in the banking industry, specializing in trust and asset management. Consistently exceeded performance expectations and achieved success through a strong knowledge of financial products and services. Proven track record in developing new business opportunities, managing customer relationships, training staff on banking procedures, and performing detailed risk analysis.

## EDUCATION

2015 - 2017

### MS in Finance

North Central University / Minneapolis, MN

Graduated top 5% of the class

Thesis: "Dynamic Portfolio Optimization: A Comparative Analysis of Traditional and Algorithmic Approaches"

2011 - 2015

### BS in Accounting

North Central University / Minneapolis, MN

Graduated Summa cum Laude

## SKILLS

- Financial Analysis Expert
- Risk Management Expert
- Loan Origination Expert
- Regulatory Compliance Expert
- Investment Strategies Expert
- Sales & Marketing Expert
- Relationship Management Expert
- Negotiation Skills Expert
- Data Analysis Expert
- Accounting Expert

## EXPERIENCE

2020 - Now

### Senior Relationship Manager Moon Trust / Denver, CO

- Spearhead relationship management for high-net-worth clients, overseeing a diverse portfolio and ensuring personalized financial solutions.
- Develop and implement strategic financial plans, resulting in a 25% increase in client assets under management.
- Conduct comprehensive financial analyses, assess risk, and provide expert guidance on investment opportunities, demonstrating a deep understanding of market trends.
- Manage and mentor a team of junior bankers, providing training in financial products, client engagement, and risk assessment.

2017 - 2020

### Associate Banker Midwest Bank / Minneapolis, MN

- Assisted clients with account management, loan applications, and financial inquiries, ensuring a seamless customer experience.
- Collaborated with cross-functional teams to streamline internal processes, resulting in a 15% improvement in operational efficiency.
- Conducted financial workshops for community members, promoting financial literacy and strengthening the bank's community presence.
- Assumed a leadership role in the implementation of a customer relationship management (CRM) system, enhancing client data management and communication.