

ANDRE GREEN904•386•3826 ▪ andregreen@synovus.com

RELATIONSHIP MANAGEMENT FINANCIAL PROFESSIONAL

Accomplished Sales Leader and Relationship Management Professional with 10+ years of success cultivating, retaining, and expanding banking relationships through outstanding business development strategies, excellent customer relationship management, and superior client service.

- Ability to Leverage Interpersonal Skills to Lead Sales Efforts That Consistently Surpass Goals and Objectives.
- Thrives in Dynamically Changing Environments Requiring Focused Decision Making.
- Results-Driven Strategist with A Record of Achievement and Demonstrated Success Driving Multimillion-Dollar Revenue Growth While Providing Sales Leadership in Highly Competitive Markets.
- Forges Business Initiatives, Securing Brand Loyalty and Deepening Existing Relationships with Both Internal and External Business Partners. Exceptional Mentor and Coach.
- Poised and Articulate Company Ambassador with Excellent Influencing, Communication, and Presentation Skills.
- History of Fast-Track Promotions and Awards Based on Sales Performance.

PROFESSIONAL EXPERIENCE

Synovus Bank, Jacksonville, Florida
Private Wealth Advisor

2019-Present

A seasoned Financial professional who provides wealth planning as well as lending strategies for affluent clients in addition to business owners. I assess my client's past, present and future financial needs, objectives and requirements. I facilitate meeting those needs and goals by proactively building relationships with clients, providing ongoing advice and drawing on the range of available products offered. I initiate, proactively cultivate, and develop successful and profitable relationships as a guide and skilled expert resource.

Bank of America/Merrill Edge, Jacksonville, Florida
Vice President, Platform Development Manager

2011- 8/2018

Beginning as **Financial Solutions Advisor** for the Merrill Edge Advisory Center, assessed client circumstances and investment objectives, and determined financial strategies and plans to aid clients in achieving goals.

- Communicated with clients to review portfolio against plan, submitted transaction requests and asset transfers, and ensured that clients' needs were addressed timely, accurately, and with outstanding service.

Advanced to **Assistant Vice President, Investment Consultant**, Client Relationship Team, Top Tier, responsible for broadening existing and prospective client relationships and recommending products and services. Facilitated a successful onboarding process for new clients, ensuring their comfort with tools and processes.

- Achieved top producer status in Jacksonville as well as 3 other locations for several quarters by soliciting \$70 million in new money.

- Promoted to **Vice President, Platform Development Manager**, leading sales support for the entire Southeast region of the United States. Designed and implemented programs, processes, and initiatives for Financial Advisors to deliver the full power of Merrill Lynch to clients through tailored solutions.
- Served as primary advisor and facilitator for the region, responsible for guiding Advisors on best sales practices, operations efficiencies, and the use of company tools to achieve sales goals.
- Instrumental in assisting the Southeast region capture \$2 billion in self-directed assets in calendar year 2017.
- Designed and implemented innovative incentive packages to entice high net worth clients to select Merrill as their investment platform.
- Developed business development strategies to cultivate relationships to acquire clients for lenders. Provided responsive, well-structured money management solutions which met the goals and needs of a wide array of customers.
- Continually developed and expanded centers of influence and delivery channels.
- Documented transactions in compliance with applicable laws, regulations, and bank policies and procedures as well as the continuous delivery of highly quality service to clients.
- Managed client relationships and regularly met with clients to keep abreast of information concerning their needs, strategic direction, and earnings. Consulted with clients to identify product solutions that met client needs. Performed maintenance and constant analysis of assigned portfolio to ensure that portfolio had not deteriorated, proper documentation was available, and activities were monitored.
- Active in local and regional business and community activities, including attendance at business functions and professional networking events to market products and services and enhance community awareness.

John Hancock Financial Network, Jacksonville, Florida
Financial Professional

2008-2011

- Advised clients on reaching investment objectives. Identified financial goals for clients and proposed solutions to implement a financial strategy with the purchase of annuities and investment products. Assisted clients in selecting health, life, and long-term care insurance products to protect their assets.
- Consulted with employers on various benefit programs, guiding on various benefit options to offer employees.
- Served as a guide and point of contact for clients and ensured all service requests were managed timely, accurately, and with outstanding service.

EDUCATION

Bachelor of Science in Finance, University of North Florida, Jacksonville, Florida

LICENSES

FINRA Series 7, Registered Representative 66, and Series 9/10 Principal Licensed
 Florida Life, Health and Variable Annuity Licensed

AFFILIATIONS AND COMMUNITY SUPPORT

Rotary Club of Ponte Vedra Beach
 Family Foundations Board Member