

Ramon Vicioso
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Professional Relationship Manager

Over 20 years Customer Service and Sales experience dedicated to achieving profitability and delivering outstanding customer service. Successfully coached 30 Personal Bankers at 4 Bank branches, to help customers discover opportunities, help them with their financial and banking needs, and turn them into long-term clients. Extensive background in Banking Sales, Business Administration, Finance, and Marketing. Multilingual (English, Spanish, German). Skilled in providing courteous service to customers from diverse socioeconomic and cultural backgrounds. Strong personal ethics and integrity. Treat each customer as a potential lifetime purchaser. Convey a professional image of honesty, compassion and concern for my customers' needs. Highly organized team-builder with strong leadership experience. Excellent communicator seeking a challenging Professional Relationship Manager position with Bank of Central Florida, with the opportunity for professional growth.

Education and Credentials

Series 7 License
Series 6 & 63 & 66 Licenses
Variable Life Insurance License - State of Florida
SAFE (Mortgage Licensing Act)
1,000 Hours Customer Service & Sales Training
U.S. Military Veteran
Software skills include Microsoft Office (Excel, Word, Outlook)

Experience

Assistant Vice President Regional Bank Premier Banker II (*Private Banker II*)

7/2017 - Present

Wells Fargo, Lakeland, FL

- Currently I am the most senior Wells Fargo Banker in all of Polk County.
- Selected by management to personally recruit and identify new high-net-worth individuals requiring large lines of credit (up to \$25 million).
- Consistently generate millions of dollars new annual revenue in deposits, credit, and investments.
- Thereafter, guide and introduce such clients to appropriate Wells Fargo Partners and Business Experts in other areas of the Bank (Payroll Services, Merchant Services, and Treasury Management Services).
- Maintain a network of professionals inside and outside the Bank to assist customers.
- Coach and mentor other Bankers to develop and refine their relationship-building skills.
- Demonstrated ability to convince existing Bank customers to transfer outside investments to Wells Fargo.
- Responsible for community engagement and managing and growing a portfolio of individuals and small business clients within their given market.
- Skilled in identifying opportunities to add value to the personalized client experience.
- Collaborate with bankers and support staff to deliver high quality service.

- Accountable for calling activity, proposal generation, revenue generation, risk mitigation, and the ability to build successful relationships.

Commissioner (Unpaid Public Service Position)

6/2017 - 8/2018

Charter Review Commission, Polk County, FL

- Appointed by the Board of Commissions to hold this important position for 1 year tenure.
- Responsible for reviewing the Polk County Charter and proposing Amendments for Public Referendum.

Assistant Vice President Regional Bank Private Banker

11/2014 - 7/2017

Wells Fargo, Lakeland, FL

- Extensive experience providing private banking, investment and other financial services to high-net-worth individuals, including credit and deposits.
- In 2015, successfully brought \$10 million to the bank (50% in investments) within this small Metro area (80,000 population).
- Ranked #1 RBPB in North Central Florida (2015).

Personal Banker II / Brokerage Associate (Licensed Banker)

6/2012 - 11/2014

Wells Fargo, Lakeland, FL

- Originally hired as Personal Banker 1; promoted to Personal Banker II; promoted to Brokerage Associate (Licensed Banker).
- Variable Life Insurance License (passed exam first time).
- Series 6 & 63 Licenses (passed exam first time).
- Consistently met and exceeded performance goals, in spite of low-income local population.
- Achieved "Gold Level" (Q1 2013).
- Ranked "Top Personal Banker I in Loan Volume - Central Florida Region" (Q1 2013).
- Managed a premier/excellent household customer portfolio.
- Profiled customers to determine their needs, then cross-sold appropriate products and services and/or referred customer to partners.
- Provided broad base of services, including deposit-based, credit, investment and fee-based products, with the goal of acquiring 100% of each customer's business.
- Developed and maintained relationships with Wells Fargo partners to maximize sales opportunities and achieve minimum sales standards.
- Proactively made outbound sales calls to inform customers about a wide variety of financial services solutions to meet their needs and deepen the customer experience.
- Maintained compliance with S.A.F.E. Mortgage Licensing Act of 2008 and all related regulations.

Sales Consultant

9/2010 - 6/2012

Cannon Automotive Group, Lakeland, FL
(Cadillac & Buick Auto Dealership)

- New and pre-owned vehicle sales.
 - Responsible for customer service, product presentation, follow-up, and financial advice.
 - Received "Salesman of the Month Award" numerous times.
 - Maintained Customer Satisfaction Index over 90%.
 - Ranked "Top 3 Sales" - out of 8 Sales Consultants.
 - Consistently meet and exceed sales targets.
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