

SUSAN FITZGERALD

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QUALIFICATIONS SUMMARY

Performance-driven, insightful **Investment Banker** with proven ability to achieve and exceed all revenue and business-development goals in high-pressure environments.

- Skilled at consulting with clients to delineate and analyze financial situations while developing strategic solutions that strengthen investment goals.
- Relationship-development expertise that complements the ability to aggressively build solid client base and drive revenue growth.
- Comprehensive knowledge of, and experience in, leveraging numerous investment instruments in a variety of complex scenarios.
- Proven leadership and team-building skills, coupled with the ability to direct strong teams in managing customer relationships and providing investment services.

PROFESSIONAL EXPERIENCE

VISIO LAKE BANK, Minneapolis, Minnesota

Investment Officer, 2007–Present

Established solid 8+-year record of achievement, advancing through increasingly responsible financial investment positions. Manage relationship-banking team with keen focus on maximizing revenue and territory profitability. Lead team in investment product sales and delivery of customer relationship management techniques. Collaborate with clients to assess individual financial situations and develop strategic financial planning solutions. Oversee securities transactions, funds transfers, margin accounts, and option trades.

Selected Accomplishments:

- Consistently maintained 100% or better of established production goals; achieved 127% of 2006 business development goal set at \$10 million in assets.
- Recognized for outstanding professional acumen with national awards for annual production of Kicheen Capitol and Persephone mutual funds in 2010 and 2011.

VISIO LAKE BANK, Minneapolis, Minnesota

Investment Consultant, Private Banking, 2005–2007

Served as key team member in the brokerage division of fiduciary, investment management, and private banking services to new and existing high-net-worth clientele. Established and maintained strong relationships with fixed-income investment clients to drive revenue growth.

Selected Accomplishments:

- Surpassed customer retention and business development goals by building client base to more than 600 investors.
- Received Alliance Capital Advisory Award for ranking among the top 200 advisors worldwide in new business development.

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VISIO LAKE BANK, Minneapolis, Minnesota

Financial Consultant, 2002–2005

Developed client base through network and seminar marketing. Ensured client retention by providing strategic investment recommendations based on evaluation of analyst reports covering fixed-income and equity investing. Employed numerous investment instruments in option hedging strategies and trading scenarios, including fixed-income and equity securities.

Selected Accomplishment:

- Consistently exceeded established account development and revenue-generation goals.

MORRIGAN INSURANCE, Hibbing, Minnesota

Registered Representative, 1999–2002

Collaborated with legal counsel and accounting teams to develop marketing strategies for estate and business succession planning insurance. Created proposals exhibiting extensive detail in internal revenue code and estate tax law. Developed solid estate and tax code knowledge base.

Selected Accomplishment:

- Executed strategic sales techniques resulting in a solid account base and consistent performance above quotas.

EDUCATION AND CREDENTIALS

Master of Business Administration (MBA) in Finance, 2006

MINNESOTA STATE UNIVERSITY, Mankato, Minnesota

Bachelor of Science in Business Administration, 1999

SOUTHWEST STATE UNIVERSITY, Marshall, Minnesota

Professional Licenses

NASD SERIES 7, 6, 63, & 65

Professional Training

DALE CARNEGIE SALES TRAINING ▪ ACCOUNT MANAGEMENT SYSTEMS
LEADERSHIP & TEAM BUILDING