MELVINA SOROKA

Private Banker

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(764) 618-5120
123 Maple Street, Indianapolis, IN 46204

PROFILE

Private Banker with 2 years of experience in providing high-net-worth clients personalized banking and wealth management services. Proficient in building strong relationships, identifying clients' financial needs, and offering tailored solutions to grow and protect their wealth. Demonstrated success in asset management, loan origination, and investment advisory services. Committed to maintaining client confidentiality and delivering exceptional results.

LINKS

linkedin.com/in/melvinasoroka

SKILLS

- Portfolio Management
- Risk Assessment
- Client Acquisition
- Financial Analysis
- Relationship Building
- Tax Planning
- Investment Strategy

LANGUAGES

- English
- Mandarin

HOBBIES

- Wine tasting

EMPLOYMENT HISTORY

Private Banker at First Merchants Private Wealth Advisors, IN

Feb 2023 - Present

- Successfully increased the client portfolio by 35% within the first year, attracting over $50 million in new assets from high-net-worth individuals and families in Indiana.
- Implemented a comprehensive financial planning strategy for clients, resulting in an average annual return of 12% on their investments and a 90% client retention rate.
- Spearheaded the development and launch of a new wealth management product offering, generating a 25% increase in revenue for the Private Wealth Advisors division in just six months.
- Established a strong referral network with local businesses and community organizations, leading to a 40% growth in the client base within two years.

Associate Private Banker at Old National Wealth Management, IN

Jul 2021 - Jan 2023

- Successfully managed a portfolio of over $50 million in assets, resulting in a 15% increase in revenue for the company.
- Developed and implemented investment strategies for high-net-worth clients, leading to a 20% increase in client satisfaction and retention rates.
- Assisted in acquiring 10 new high-net-worth clients, contributing to a 25% growth in the overall client base within one year.

EDUCATION

Bachelor of Business Administration in Finance at Indiana University Kelley School of Business, Bloomington, IN

Aug 2017 - May 2021

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Investment Analysis, Financial Markets and Institutions, Risk Management, International Finance, Financial Statement Analysis, Business Statistics, and Portfolio Management.

CERTIFICATES

Certified Private Banker (CPB)

Dec 2021

Certified Wealth Management Advisor (CWMA)

Jan 2020