EUGENIA NABOKIN

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PROFILE

High achieving, driven, client focused private and business banking professional; Proven track record of success in building and growing lasting relationships with discerning, high demand clientele and exceeding aggressive sales goals. Strong problem solving and communication skills. Additional expertise includes:

- Excellent understanding of portfolio management and wealth planning strategies gained through client management experience and the successful completion of the Boston University Financial Planning Program.
- Ranked in top 1% of Relationship Managers in Business Banking nationally
- Ranked in the top 5% of Small Business Bankers in Greater Boston division- top 3% nationally
- Successfully partner with Merrill Lynch Advisors, Financial Solution Advisors, Middle Market, Small Business Banking, and the Private Bank to generate business opportunity
- Proficient in MS PowerPoint, CMO, PACE, Interact, Salesforce and a wide range of proprietary information systems.
- Demonstrated exceptional ability to build relationships and rapport with business partners and clients
- Highly proficient in outbound calling and client management process
- New Hire mentor and leader

RELEVANT PROFESSIONAL EXPERIENCE

BANK OF AMERICA

VICE PRESIDENT, BUSINESS BANKING RELATIONSHIP MANAGER- GREATER BOSTON, MA April 2019- Present

- Currently ranked #2 Relationship Manager in the country, #2 in the region and #1 In the Southeast market.
- Leading business integration activities for the market
- Accountable for prospecting and acquiring new relationships through networking, cold calling, referrals, and community involvement resulting in 4 new relationship and 7 Net new growth relationships
- Manage a portfolio of 50 existing relationships to enhance profits and deepen relationships while providing world class service.
- Collaborate with Merrill Lynch Advisors, Private Bank, Middle Market, Home loan and Consumer/Small Business to drive the One Team approach
- Identify cross sale opportunities and facilitate referrals within the organization leading to referrals for Merrill Lynch, Private Bank and Small business.
- Act as a mentor for upcoming Small Business Bankers and Relationship Bankers in the financial centers.
- Act as the “Go-To” for all thing business related for the Newton Merrill Lynch office

VICE PRESIDENT, SMALL BUSINESS BANKER- GREATER BOSTON, MA October 2016-April 2019

- Finished 2018 as a 5-star banker by hitting over 150% to 300% of sales goals in individual categories
- Accountable for prospecting and acquiring new priority small businesses, as well as retaining and deepening over 300 existing relationships with sales revenue between $500k to $5M
- Analyze the client's financial condition and recommends financial solutions to best meet the client's business and personal needs.
- Able to analyze financial conditions of clients and industry trends
- Understand and interpret financial statements and cash flow analysis
- Exceeded sales goals based on market metrics
- Prospect, cold call, network and develop new business opportunities within the small business banking community
- Leverage the power of Bank of America to provide comprehensive financial solutions to clients and financial center employees

SANTANDER BANK

ASSISTANT VICE PRESIDENT, SMALL BUSINESS RELATIONSHIP MANAGER II- WELLESLEY, MA October 2015-October 2016

- Professionally managed and grew existing portfolio along with self-sourcing new business opportunities
- Utilized diligent marketing and networking effort to obtain and retain business clients with sales revenue between $500K to $5M
- Built relationships and referred clients for Payroll, Merchant Service, Cash Management and Commercial Business Banking partners. Successfully leveraging business partners to deepen clients objective and needs
- Used holistic based approach to use financial analysis and cash flow analysis to determine financial needs
- Provided financing options such as term loan, line of credit, equipment financing, commercial real estate and letter of credit
- Provided wide array of banking products such as Checking, Money Market Savings, CDs, online BillPay and Onsite Check deposits.
- Utilized extensive referral network of BNI, CPA's, local Attorney's and financial advisors, along with branch partners

UBS

Wealth Planning Analyst- Wellesley, MA June 2015-October 2015

- Financial Advisor development program
- Worked with multiple financial advisors in several locations to build skills and knowledge necessary to succeed as a Wealth Planner
- Evaluate a client's status and determining the appropriate program to achieve their financial goals

U.S. Trust, Bank of America Private Wealth Management March 2008 – June 2015

Assistant Vice President, Private Banking Specialist- Providence, RI *March 2014- June 2015*

- Relationship Manager, responsible for developing and retaining 500 at risk Private Client relationships.
- Build strategic partnerships with multiple business partners within the organization.
- Recognized relationship deepening opportunities and make referrals to internal lines of business including Merrill Lynch Wealth Management and Business Banking.
- Developed in-depth understanding of clients' needs, preferences and overall wealth and leverage business knowledge to meet clients' needs.

Officer, Client Service Officer II -- Boston, MA *September 2010- March 2014*

- Primary point of client contact for a book of over 300 Private Client relationships.
- Coordinated with business partners including Portfolio Managers and Trust Officers to fulfill client needs including new account opening, asset transfers, and servicing of residential real estate and custom credit products.
- Managed multiple initiatives simultaneously and responded to client or internal Team requests with accuracy and efficiency.

Senior Personal Banker – Bank of America, Boston, MA *March 2008- September 2010*

- Consistently exceeded over 100 % of sales goals by building new and deepening existing relationships in a fast-paced customer service environment reaching over 400% of sales goal in Q3 2008.
- Developed and maintained relationships with numerous channels within the Bank including but not limited to Merrill Lynch and US Trust.
- Opened deposit accounts, and originated applications for credit cards and mortgage loan.

First Guarantee Mortgage, Saratoga Springs, NY February 2007- November 2007

Mortgage Consultant/Loan officer

- Rated top 10 out of 100 team members in sales. Closed an average of $12,000 to $15,000 in fees every month.
- Cold called over 150 leads daily and followed up on current loans in the pipeline.

- Honed knowledge of refinancing and purchasing process with each lender and exercised judgment to present best possible product to each client.
- Direct liaison between clients and lenders through purchasing or refinancing process.
- Built relationship with new and existing clients along with appraisers and realtors in the market.

Venturi Staffing Partners, Boston, MA November 2007-March 2008
Permanent Recruiter
- Closed over $16,000 in fees within three months of employment.
- Cold called potential clients and warm called candidates on a daily basis.
- Drafted ads for potential clients.

EDUCATION

Omega July 2016
Commercial Credit training

Boston University- Boston, MA July 2012- May 2013
Graduate, Financial Planning Program

State University of New York at Oswego- Oswego, NY
Bachelors of Arts in Public Justice May 2006