

# Shante Branch

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## Summary

Multifaceted leader with over a decade of experience serving as a trusted advisor to high-value clients. Proven track record in relationship management, business development and strategic planning. Known for being influential, articulate, and methodical in solving problems.

## Experience

### **Business Relationship Manager | JPMorgan Chase & Co | March 2020 - Present**

- Manage and retain a portfolio of 90-100 high net worth clients with revenues of \$1MM to \$25MM, increased business deposit balances YOY by 17%.
- Conduct in-person meetings with prospects, centers of influence, and existing clients at their place of business or virtually; to provide comprehensive and customized business banking solutions.
- Deliver high-touch onboarding post-sales, increasing implementation of digital banking products.
- Ensure clients fully leverage and get value from all aspects of the JMPC Banking platforms, leading to operational and optimal efficiency.
- Collaborate with key internal partners to relay client objectives and drive strategic deals.
- Utilize Industry Intelligence, providing a diversified portfolio of business clients highly-specific data and strategic insight, giving guidance on change management.

### **VP, Branch Manager/ Sales Manager | JPMorgan Chase & Co | July 2017 – February 2020**

- Promoted to Branch Manager after 7 months in Sales Manager role due to exceeding company objectives.
- Managed a fast-paced branch with \$600MM in assets and supervised 13 direct reports, increasing Branch performance level from 6 to 2 within a year.
- Collaborated with team members to discuss product enhancements and features, leading to a solid understanding across LOBs.
- Delivered engaging presentations of company products to new clients, explaining technical information in simplified language, resulting in an increased client base.
- Recognized as top Branch in market for exceeding company Digital Adoption initiatives by 52%, while maintaining a 100% client satisfaction score.
- Actively participated in Town Hall meetings with C-level executives to present new ideas and client feedback.
- Analyzed performance and sales data using CRM software to strategize new opportunities.

## Education

### **Bachelor of science: Business management & Economics | New York, NY**

SUNY Empire State College | May 2020 | GPA: 3.5

## Skills & Abilities

- Communication & Presentation
- Working Collaboratively
- Team Leadership
- Onboarding & Orientation
- Conflict Resolution
- Financial Acumen

## Additional Information

- *FINRA Licenses:* Series 6 (expired) Series 63 (expired)
- *Volunteerism:*
  - Digital Photo Editor for Mt. Sinai Church: Manage workload of images, prioritizing and completing editing to meet the demands of scheduled events
- *Technical Skills:* MS Office Suite, Figma, Adobe Creative Suite