Megan O'Brien

SENIOR RELATIONSHIP BANKER

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SUMMARY

Senior relationship banker with 9 years in retail and small business banking, managing $72M in client deposits at a Boston branch. Builds long-term relationships through annual financial reviews, consumer lending and small business banking, and coaches 4 bankers on product knowledge and sales.

SKILLS

- Relationship Management
- Small Business Banking
- Consumer Lending
- Credit Analysis
- Treasury Management
- Sales
- Product Knowledge
- Microsoft Office
- CRM
- Customer Service Skills

EXPERIENCE

Senior Relationship Banker 04/2022 - Present

Harborview Savings Bank Boston, MA

Mutual savings bank with 26 branches in Greater Boston.

- Manage a book of 420 households and 85 small business clients holding **$72M** in deposits.
- Originate $4.8M a year in home equity, auto and small business loans, preparing credit analysis for approval.
- Coach 4 personal bankers on needs-based sales and product knowledge, lifting their account openings 30%.
- Retain 96% of portfolio deposits through rate changes by holding annual reviews with the top 100 clients.

Relationship Banker 06/2018 - 03/2022

Bay Colony Bank Cambridge, MA

Commercial and retail bank with 14 branches.

- Grew a new small business portfolio from 20 to **70** clients in 2 years through chamber events and referrals.
- Sold treasury and merchant services to 25 businesses, adding $6M in operating deposits.
- Resolved escalated complaints on fees, holds and fraud for the branch manager.
- Logged every call and review in Microsoft Office and the bank CRM to meet a 60-contact monthly goal.

Bank Teller 06/2017 - 05/2018

Commonwealth Cooperative Bank Quincy, MA

Cooperative bank with 6 branches on the South Shore.

- Processed 100+ deposits, withdrawals and loan payments a day with a balanced drawer.
- Referred **12** customers a month to bankers for CDs, credit cards and home equity loans.
- Earned promotion to relationship banker after 11 months on the teller line.

EDUCATION

Bachelor of Science 05/2017

University of Massachusetts Boston Boston, MA

Finance

CERTIFICATES

NMLS Registered Mortgage Loan Originator

Nationwide Multistate Licensing System

05/2022

Securities Industry Essentials (SIE)

FINRA

10/2021