MARY JONES

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RELATIONSHIP MANAGER • ACCOUNT EXECUTIVE

High-energy, financially astute, results-focused professional with more than 20 years of benchmark performance in accelerating business growth, improving competitive advantage, and driving new levels of efficiency in service-intensive business environments. Adept at building, cultivating, and managing long-term client relationships based upon a foundation of trusted and knowledgeable advice. Respected and resourceful team leader, trainer, and motivator, with a track record of developing and implementing process improvements to optimize employee productivity.

Key areas of competency and strength include:

Relationship Management • Client Acquisition & Retention • New Business Development
Strategic Planning & Execution • Competitive Market Positioning • Performance Management
Turnaround Management • Client Needs Analysis • Operations Leadership

SELECTED CAREER ACCOMPLISHMENTS

√ **Revitalized stagnant business relationships** with private banking and wealth management clients for the highest revenue-generating business unit of a global company. Successfully obtained long-term contractual commitments that drove significant levels of recurring revenue growth.

√ **Developed learning modules and delivered customer-focused training** to more than 300 Customer Relationship Managers, which significantly improved client satisfaction scores and levels of retention.

√ **Supported major project implementations and acquisitions over a 10-year period**, which facilitated the ongoing growth and expansion of a leading global services organization.

√ **Turned around and restored fiscal responsibility** to a highly disorganized mutual fund servicing department reeling from out-of-control write-off expenses. Developed first-time written procedures, re-trained staff members, and implemented a new automated system that provided accurate records of all transactions.

√ **Played instrumental role in the startup and growth of a privately owned business enterprise**, which has grown form $50K to more than $500K in annual billings over a 12-year period.

√ **Hand-selected by senior management** as one of six out of more than 1,500 employees to serve on a special board tasked with identifying areas for process improvements and communicating findings to the CEO, as the company entered into a reorganization phase.

√ **Selected three times to the "En-Trust Leadership Club" over tenure** for contributions that were instrumental to the company's ongoing growth and success.

PROFESSIONAL EXPERIENCE

GENERAL CONTRACTING, LLC, Parsippany, NJ — 1997 to Present

BUSINESS MANAGER

Brought on board to establish and manage business operations during the company's startup phase. Currently oversee all aspects of operations including accounting, estimating, vendor relations, and job scheduling. Proactively manage client relationships, which contributes to the company's ongoing growth entirely through qualified referrals.

- Reduced operating expenses for the past 4 consecutive years by scrutinizing business expenditures and identifying new ways to complete jobs in a more cost-effective manner.
- Minimized operating expenses by learning to perform all aspects of business financial management, including bookkeeping, invoicing, payroll, estimating, A/P, and accounting, thereby eliminating the need for retaining outside consultants.

EN-TRUST INVESTMENTS, Oaks, PA — 1989 to 2006

PROJECT SPECIALIST – *Private Bank & Trust Division* *(2000-2006)*

Retained by company on a part-time basis, after taking full-time leave to a raise family. Managed special projects that focused on internal staff training and development, client acquisition and retention strategies, service delivery enhancements, and product and service upgrades.

- Developed instructional manuals and trained more than 300 CRMs on strategies to better understand their clients, which resulted in significant improvements in client satisfaction scores and retention levels.

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DIRECTOR MUTUAL FUND SERVICES – *Trust Company* *(1998-1999)*
Hand-selected to turn around performance of a troubled division, on the brink of insolvency, that provided back office processing for all client mutual fund trades. Established new guidelines, implemented internal personnel changes, conducted ongoing staff training, and introduced new automated procedures to establish accountability and restore profitability and growth.

- Developed and implemented first-time written procedures that provided staff members with clear-cut guidelines for timely processing and recording of all trades.
- Implemented new measures for accountability that stemmed recurring losses and returned the department to profitability.

RELATIONSHIP MANAGER – *Private Bank & Trust Division* *(1993-1998)*
Managed relationships with private banking and wealth management clients throughout the Northeast Region for the highest revenue-generating division in the company. Generated new business by presenting new products and platforms to prospective and existing clients.

- Re-contacted private banking and wealth management clients to identify new sales opportunities and secure long-term contracts.
- Strengthened relationships with Asian clients by collaborating with production control management to develop a 24-hour processing platform that was essential for meeting their functional requirements.

ACCOUNT MANAGER / SR. APPLICATIONS ANALYST – *Private Bank & Trust Division* *(1989-1993)*
Selected for participation on hand-selected corporate team to identify areas for process improvement and recommend strategies for implementation as the company entered into reorganization. Played instrumental role in migrating all clients to an enhanced mutual fund processing platform.

- Built a service team that focused on the specific needs of community bank clients.
- Received excellence award for contribution to team.

PNB / CORESTATES BANK, Philadelphia, PA 1986 to 1989
TRUST OPERATIONS OFFICER
Managed three separate groups in the operations department: Money Market Processing, Transfer/Re-registration, and Vault Processing.

COMMUNITY BANK, Philadelphia, PA 1982 to 1986
DISCOUNT BROKERAGE OPERATIONS MANAGER – *Trust Operations Department*
Built the Discount Brokerage Operations Unit from conception to a full-service, completely automated operation.

EDUCATION / TRAINING / LICENSURE

Bachelor of Science, Business Management – THE OHIO STATE UNIVERSITY

Professional development programs:
Canon Financial Institute – Investments & Trusts
New York Institute of Finance – The Fixed Income Market
Leadership Training
Train-the-Trainer Workshop
Public Speaking

Licensure:
NASD Series 7 – General Securities Representative