



# Natalia Cortez

## Relationship Banker

☎ (773) 555-4172 ✉ natalia.cortez@example.com

🌐 linkedin.com/example/nataliacortez 📍 Chicago, IL 60618

## STRENGTHS

- 💬 **Client Discovery**  
Asked practical questions during banking scenarios, clarified priorities, and became a trusted peer resource for solution mapping.
- 📄 **Digital Guidance**  
Walked clients through ATM, mobile banking, and online banking tasks. Calm explanations made unfamiliar steps easier.
- ♥️ **Cash Accuracy**  
Practiced balancing and verification with care. Supervisors valued consistent documentation and timely escalation during controlled exercises.
- ➡️ **Referral Judgment**  
Connected client needs with lending, small business, and investment specialists. Thoughtful handoffs kept client interests in focus.
- 🚀 **Adaptable Service**  
Adjusted communication during role play and service recovery cases. Feedback quickly shaped clearer questions and smoother follow up.

## SKILLS

Adaptability   Business acumen  
Client focus   Oral communication  
Problem solving  
Account management  
Client experience  
Client management  
Client solutions  
Relationship building  
Business development

## SUMMARY

Early career banking candidate and current **Year Up banking intern** with supervised experience supporting client conversations, **financial needs** discovery, cash handling, digital banking education, referral identification, and financial center operations. Applies a client first approach when guiding routine ATM, **mobile banking**, and **online banking** transactions, documenting client priorities, and routing needs to appropriate specialists. Academic work has strengthened account management, prospecting, pipeline activity, sales conversations, and ethical recommendations involving lending, small business, and investment referrals. Demonstrates adaptability, work ethic, critical thinking, problem solving, time management, oral communication, and technology learning within regulated banking settings. Brings careful attention to risk controls, privacy, operational procedures, and accurate documentation, with a genuine interest in helping clients make informed financial decisions.

## EDUCATION

### Associate of Applied Science in Business Administration

Harold Washington College 🎓 GPA: 4.0 📅 2026 📍 Chicago, IL

***Coursework:** Financial services, business management, client relations, sales principles*

## TECHNICAL SKILLS

- **Digital Banking:** ATM education, mobile banking, online banking
- **Cash Operations:** Cash balancing, transaction verification, cash documentation
- **Client Management:** Needs discovery, account management, client follow up
- **Referral Management:** Referral identification, referral tracking, specialist routing
- **Sales Activities:** Prospecting, pipeline tracking, outbound calls
- **Financial Services:** Checking accounts, savings accounts, financial products
- **Branch Operations:** Lobby flow, appointment scheduling, capacity management
- **Risk Controls:** Privacy procedures, escalation controls, operational controls
- **Business Solutions:** Small business referrals, lending referrals, investment referrals
- **Productivity Tools:** Microsoft Excel, spreadsheet tracking, documentation workflows

## EXPERIENCE

### Year Up Banking Intern

Banking Internship Program 📅 January 2026 - Present 📍 Chicago, IL

Supports supervised financial center service through client engagement, transaction guidance, cash handling practice, digital banking education, referral documentation, and controlled operational workflows. Learns regulated banking procedures while contributing to orderly lobby flow, appointment coordination, outbound contact, and needs based service.

- Supported supervised client intake, routing visits to transaction, digital, or specialist channels.
- Guided **ATM, mobile banking**, and online banking tasks using approved client education.
- Practiced **cash handling**, balancing, verification, documentation, and escalation under established controls.
- Conducted needs based conversations, recording priorities for lending, **small business**, and investment **referrals**.
- Maintained appointment, outbound contact, and follow up records supporting orderly **lobby flow**.
- Applied privacy expectations, risk controls, operational procedures, and regulatory guidance during assignments.

## PROJECTS

Retail Banking Client Solutions Project 📅 December 2025

Pipeline management    Prospecting

## Referral management

## Cash handling

## LANGUAGES

English

Native

Spanish

Proficient

## MY CAREER



- Year Up Banking Intern at Banking Internship Program (8 Months)

Modeled household banking conversations, solution mapping, referral decisions, and spreadsheet pipeline tracking across 40 client cases. Evaluated ATM, mobile, and online banking journeys, then presented client education needs and referral discipline to faculty and peers.

## Sales and Client Relationship Simulation 📅 May 2025

Practiced prospecting, needs discovery, ethical recommendations, individual goals, service recovery, and pipeline follow up through structured role play. Documented client cases and applied instructor feedback to improve listening, time management, questioning, and presentation clarity.

## LEADERSHIP & AWARDS

- Dean's List, Harold Washington College, 2025
- Student Achievement Recognition, Business Department, 2026

## CERTIFICATIONS

- Year Up Financial Services Training Certificate 📅 2026
- Microsoft Excel for Business, Coursera 📅 2025

## PROFESSIONAL AFFILIATIONS

- Peer Career Readiness Mentor, 2025 to 2026
- Campus Financial Literacy Volunteer, 2025 to 2026

## ADDITIONAL INFORMATION

**Work Status** : Authorized to work in United States. No sponsorship required.

## REFERENCES

AVAILABLE ON REQUEST