Christopher Bishop

Small Business Mentor & Coach

Objective – *Manage complex business relationships as part of an inspired relationship management team.*

Experience | *11 years Relationship Management, 13 years Finance, 16 years Team Leadership*

Small Business Specialist – *UMB Bank* **2021-Present**

As part of a de novo team, function as a small business relationship manager for a portfolio of small business clients <$1MM revenue. Responsibility to generate, retain and expand lending and depository relationships with new and existing clients through direct prospecting, marketing programs, cold calling and client referrals and to serve as the primary connection for all financial services to the Small Business Banking client.

Small Business Banker – *Wells Fargo Bank* **2019 – 2021**
Assistant Branch Manager **2018 – 2019**
Personal Banker 2 **2017 – 2018**
Personal Banker 1 **2014 – 2017**

SBB – Relationship manager for portfolio of 400 small business clients ($100k-$1MM). Strict focus on growth & retention lead by consistent cash flow & credit analysis of existing & prospective clients. Proactive outreach to prospects to grow portfolio. Present a well-rounded review of each business's unique financial needs in the areas of inflows, outflows, payroll, merchant servicing, & credit utilization to meet the complex needs of each business. Review business financials (P&L, Balance Sheet, etc.) to guide applicants to success in business lending. Representative of the company in the community, engaging in the local Chamber of Commerce to build COI book & win new affluent business relationships.

ABM – Coached branch team in all areas of retail banking, with unique coaching qualifications in investment & business acumen. Lead regular team meetings around important financial topics, focused on leading the team towards sustainable household & balance growth values, professional & personal growth, and how to overall best serve our clients. Regularly reviewed branch pipeline, always keeping a pulse on the client experience & guiding the team in growth of areas lacking. Attended regular meetings with branch partners (Practice Finance, Investment, Affluent Partnership, Business Partnership) to keep on top of team trends & to best keep the client experience streamlined & cohesive. Reviewed all new business relationships for accuracy, coached investment-licensed bankers to success, & orchestrated follow-up conversations with clients where required.

PB2 – Personal financial coach to the unique needs of affluent & affluent-away consumer & small business clients. Consistent primary focus on a relationship-driven client experience through genuine conversation and assessment of financial needs. Emphasis on complex business cash flow management, estate & retirement planning (trust, life insurance) and wealth management & preservation. Leader & coach for other branch personnel on policy, security, client experience, & risk management. Thorough use of partnership with non-retail lines of business, such as Insurance, Investment, Mortgage, Business Development, & Private Banking needs.

PB1 – Mass consumer & small business financial coach and account manager. Focused on full cash flow analysis for all clients in order to ascertain unique financial needs & relevant solutions. Emphasis on business cash flow management, consumer credit, debt consultation, & budget management. Partnered with over 88 lines of business to apply client solutions.

Brokerage Associate – *Wells Fargo Advisors* **2016 – 2021**

Uncovered investment opportunities & needs, matching client goals to long-term & short-term investment strategies, balancing liquid & illiquid assets, & maintaining an all-inclusive relationship with resident Financial Adviser & Private Banking partners. Role was "referral only", not diving into specific investment recommendations, but rather initiating interest in moving funds from either Bank or Outside Brokerage to WFA & directing client to proper investment channel. Served as branch mentor for investment growth opportunities, advising towards both consumer & business investment needs. Consistently coached others in investment-related matters & what options clients had with WFA.

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Proficiencies | *Industry-Specific, Soft Skills, Software Proficiencies*

Industry-Specific Proficiencies:

• Full-Spectrum Financial Needs Assessments	• Perfect Financial Ethics Record
• Strong Sales Closure Record	• Leads Mastery
• Proven Process for Consistent Follow-Thru	• Strong Customer Service Aptitude
• Long History of Servicing Local Businesses	• Business Ownership Experience
• Resourceful Networker	• Extensive Knowledge of Lending/Investing

Soft Skills:

• Excellent Communicator	• Proper Deadline & Expectation Management
• Self-Motivated/Goal-Oriented	• Reliably Independent
• Excellent Organizational Qualities	• Extensive Team & Collaborative Abilities
• Proactive Mindset	• Natural Leadership Vision

Software Proficiencies:

• Windows Platforms: All Versions	• Intuit Quicken/QuickBooks
• Microsoft Office	• Salesforce

Community Engagement

- Colfax Avenue Business Improvement District – Board Treasurer | 2021-Present

Education | *BS in Music (2009), MS in Recording Arts (Incomplete)*

Master of Science in Recording Arts (Incomplete) 2009-2013

- University of Colorado Denver | Denver, CO
- Focus: Sound Design/Pedagogy
- Left degree path to focus on professional pursuits

Bachelor of Science in Music (2009) 2004-2009

- Eastern New Mexico University | Portales, NM
- Major: Music
- Minor: Music Technology

References Available Upon Request