PETER LYNCH

236 Main Street • Jersey City, NJ 07302
201.655.5545 Res • 201.555.5531 Cell • plynch@gmail.com

PRIVATE BANKING EXECUTIVE

~ ***Consistently Ranked as 1 of the Company's Best in Sales & Service*** ~

Over 9 years of success servicing high net worth clients at Citigroup and Morgan Stanley. Recognized for consistently ranking in Top 10% of all peers nationwide. Proven expertise in building strong client relationships that have produced strong loyalty and a high rate of referral business. A Qualified Financial Planner, Retirement Planning Specialist and Fixed Income Specialist with superior interpersonal skills that have earned trust and credibility with clients, peers, management and staff.

PROFESSIONAL EXPERIENCE

VICE PRESIDENT — **2000 – PRESENT**
CITIGROUP ✧ NEW YORK, NY

Accountable for the acquisition, retention and service of high net worth clients. Develop and retain business relationships by uncovering, understanding, and acting upon financial cues to meet client needs. Demonstrate expertise in retirement and estate planning, money management, securities, mutual funds and fixed income investments.

- ***Increased business 94% from $62M to $120M.***
- Credited for ***heavy cross-selling*** of other banking services that produced an approximate ***16% increase in revenues and strong customer loyalty.***
- ***Recipient of Top Performer Awards*** 2002, 2003 and 2004, and currently on track for award for 2005.
- Nominated by Senior Management for ***President's Advisory Council (1 of over 300 peers nationwide).***
- Consistently ***ranked in Top 10% in the country.***
- Acknowledged for attaining a ***+98% retention rate.*** Earned a solid reputation for integrity and quality of service resulting in a high level of referrals.
- Credited for developing and delivering dozens of presentations and seminars to clients. Selected to speak to internal groups to share personal best practices.
- Noted for training/mentoring 3 Assistants that have all been promoted in record time.

VICE PRESIDENT — **1996 – 2000**
MORGAN STANLEY ✧ NEW YORK, NY

Provided high-level relationship management to high net worth individuals for retirement, tax and financial planning. Used deep analytical skills to successfully build portfolios that included stocks, bonds, and options and mutual funds. Prepared comprehensive financial profiles to help determine clients' retirement needs and goals.

- ***Built book of business from $0 to $60M in 4 years.***
- Won National Sales Director Award, ***the highest award for new hires (out of 400 peers).***
- Consistently ***ranked in Top 1%*** of graduating class nationwide. Member of President's Club every year.
- Earned recognition as Qualified Financial Planner, Retirement Planning Specialist and Fixed Income Specialist; qualified to trade options. Delivered speeches frequently at seminars.

TERRITORY SALES MANAGER ✧ QUAKER STATE ✧ PARSIPPANY, NJ — **1993 – 1996**

- ***Ranked as Top Performer out of 200 peers.***
- Increased New Jersey and southern New York territory by 50%.

TERRITORY SALES MANAGER ✧ UNION CARBIDE ✧ DANBURY, CT — **1990 – 1993**

- ***Ranked in Top 12% worldwide out of over 1,000 peers.***

EDUCATION

BS Marketing, Minor in Communications ✧ University of Western Connecticut, Ancell School of Business

Licenses: 7, 63, 65, 31, Health & Life