

# WILLIAM CARUSO

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## ACCOMPLISHED SALES AND MARKETING PROFESSIONAL

*Keen Entrepreneurial Drive ▪ Strategic Leadership ▪ Strong Business Acumen*

Talented and results-driven sales, marketing, and business executive with extensive experience and proven track record of prospering in diverse industries. Strong qualifications to develop effective sales, marketing, and branding strategies as well as to identify and capture market opportunities to increase revenue and improve profit contributions. Collaborative, hands-on management approach with demonstrated success in leading organizations and associates to the next level. Solid communication and interpersonal skills used to build rapport and lasting business relationships with clients, staff, co-workers, and superiors. Excellent ability to open new accounts, expand volume within existing territories, and exceed client expectations.

### SUMMARY OF QUALIFICATIONS:

- Maintain a positive approach to problem-solving in fast-paced and high-volume environments.
- Expertise in interaction between numerous departments to meet individual client needs.
- Exceptional supervision, verbal/written communication, and revenue generating skills.
- Experienced in working with no direct supervision while exceeding business objectives.
- Outstanding project management experience with ability to meet or exceed rigid deadlines.
- Progressive experience in banking industry particularly in new business development.

### CORE COMPETENCIES:

- Motivating Individuals/Teams
- Results Producing Leadership
- Staff Supervision/Management
- Existing Territory Management
- Written/Verbal Communication
- Exceeding Business Goals
- New Account Development
- Sales/Marketing Strategies
- Customer/Client Retention
- Organization/Prioritization
- New Product Rollouts
- Sales/Sales Management
- Relationship Building
- Fast-Paced Environments
- Analysis/Problem-Solving

### PROFESSIONAL WORK EXPERIENCE:

**JP Morgan Chase** ▪ Rolling Hills Estates, CA

2012-Present

#### Vice President/Branch Manager

- Directly responsible for managing day to day Chase Private Client Office and retail branch.
- Responsible for branch coordination, staff training and development, workflow coordination, establishing sales and productivity goals, assisting clients with retirement and estate planning, and all aspects of client relations.
- Works closely with high-profile individuals, as well as small businesses, in ensuring that all of their financial needs are consistently met.
- Position requires extensive interface with all levels of bank personnel, including business bankers, private bankers, and loan officers.
- Was asked to manage Torrance office, along with a second office at Torrance Village, and successfully turned team around, while unit achieved gold level in customer satisfaction.
- Was promoted to Rolling Hills Estates office (the highest potential office in the area) in 2013; unit has led the market in investments, mortgages, and campaign for checking accounts.
- While working at the Torrance Del Amo office in 2012, successfully catapulted office to the top-tier group from a near bottom ranking, and unit led district in mortgage loans with more than \$80 million; office was recognized with many customer service awards in all four quarters.

**Travel Traders LLC** ▪ HQ Miami, FL  
**Vice President – Real Estate and Business Development**

2006 – 2012

- Develop new business relationships via referrals, functions, events, and ownership visits as well as build valuable working relationships with General Managers of established properties.
- Host Hotels & Resorts to gain exposure to complete property portfolio.
- Earn business through presentations to potential clients outlining company format for gift shops and hospitality services within prospective properties.
- Set-up and organize meetings with ownership groups with extensive property holdings such as Travel extensively all over the country to meet clients as well as scout out new potential properties or new construction projects in major cities.
- Attend quarterly real estate meetings at company headquarters to discuss deals in the pipeline.
- Via discussions with executive team prepare a pro forma on each property to determine company interest in presenting a detailed and thorough financial offer.
- Work closely with Hilton, Hyatt, and Marriott as well as most major hotels in the US to build relationships, earn new business, and preserve current business.
- Interact with internal operations team as well as construction and design teams to determine the look and feel for each new construction and remodel project.
- Maintain real estate database updating properties, contacts, and notes for working file.

**4 Copas Organic Tequila Company** ▪ Newport Beach, CA  
**Vice President of Sales and Marketing**

2004 – 2006

- Directly responsible for product branding in the US with special focus on the West and Southwest regions including California, Arizona, Nevada, and Hawaii.
- Organized product introduction events as well as planned gatherings at celebrity homes and functions, fund raisers, and invitation only events such as Malibu Film Festival and several NFL fund raisers throughout Southern California.
- Extensive travel to meet with investors to raise money and grow product brand quickly.
- Via client presentations, tastings, and placements in established locations throughout the West and Southwest regions grew brand sufficiently to attract major distributors resulting in product placement in sales books allowing sales reps to promote and sell the product.
- Successfully placed product with Frank-Lin and Southern Wine and Spirits.
- Prepared detailed reports for owners in order to track results and obtain more product.

**City National Bank** ▪ Century City, CA  
**Branch Manager**

2002 – 2004

- Contributed significantly to development of bank dramatically increasing company growth.
- Motivated team members to further develop effective selling skills and client relationships.
- Achieved prosperous relationships with clients resulting in Top 100 status.
- Increased investment sales by \$5M during two year duration.
- Effectively increased office ranking from 47 out of 48 to 9 out of 54.
- Increased client deposits from \$44M to \$54M within two years.
- Obtained a \$19M corporate retirement account through effective sales effort.
- Referred over \$3.5M in loans to private bank within one year.

**CitiBank F.S.B.** ▪ Santa Monica, CA  
**Financial Center Manager**

1998 – 2002

- In charge of operational diligence, staff recruitment and training, and client support.
- Assisted in development of company portfolio growth resulting in increased profitability.
- Presented bank products through consultative selling approach to prospective clients.
- Increased bank revenue from \$0 to \$23M within two years.
- Managed client portfolio which generated over \$40K per month in bank revenue.

**EDUCATION:****Bachelor of Arts in Business Administration**

Loyola Marymount University ▪ Los Angeles, CA

**Professional Education and Licensure:**

- California Real Estate License
- Various Motivational and Sales Courses

**Languages:**

- Fluent in Italian and Conversational Spanish